MARYLAND JUDICIARY

GEARS

General Enterprise And Resource Support

GR220 Managing Grant Customer Contracts

June 9, 2013

Table of Contents

GR220

GR220 Managing Grant Customer Contracts

Course Overview
Typically most Federal grants are defined as reimbursable, which means Judiciary funds are expended first and then reimbursed. However, some Federal organizations will allocate funds immediately. These are defined as "Pre-Paid" (non-reimbursable) contracts.

The GEARS Grants application integrates tasks associated with sponsored research and supports the key business processes associated with the administration of sponsored research activities. Grants is not a standalone application, as it leverages functionality delivered within the **Customer Contracts**, **Project Costing**, **General Ledger** and **Billing** processes to provide a fully integrated Grants management solution.

The Grants module integrates with Project Costing and Contracts. The Grants module is a component within the Contracts module. The Contracts module contains the rules for billing and revenue recognition. Project collects all associated costs from feeder systems such as: purchasing, payables (vouchers), general ledger (payroll) and assets. Project enables organizations to drill down to the original source document. Grants integrate with Billing through Contracts to manage billing for your awards. Billing generates an invoice which can be utilized by organizations to complete Federal draws. The integration of Receivables with Project Costing provides project managers with accounts receivable items and revenue-related adjustments. As a result, project managers have information about the progress of a project in terms of the outstanding revenue.

The *GR220 Managing Grant Customer Contracts* course discusses how to create and update customer contracts for Federal Grant sponsors.

Course Outline
The following sections and lessons provide information and step-by-step instructions on managing grant customer contracts:

- Course Audiences and Prerequisites
- Lesson 1: Updating Grant Award Contract and Award Profile
- Lesson 2: Monitoring Grant Activity
- Lesson 3: Closing a Grant, Contract & Project
- Course Summary

Course Audiences and Prerequisites

Audience(s)
The Judiciary audiences for this course are:

- Administrative Office of the Courts
  - Court Operations
  - Family Administration
  - Office of Problem Solving Courts
- District Court - Headquarters
- Court of Special Appeals
  - Foster Care Court Improvement Project
- Court Related Agencies
  - MACRO
- State Law Library

GEARS Role(s)
This course is intended for Judiciary employees with the following GEARS role(s):

- CA Customer Contracts Functions
- GM Grants Coordinator
- PC Grant Principal Investigator

Prerequisites
The recommended prerequisites for this course are:

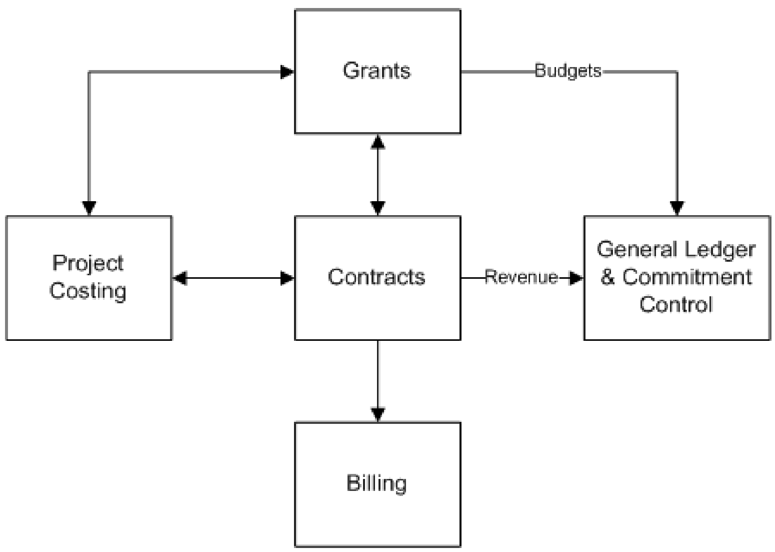
- INT100 Introduction to GEARS
- GR100 Understanding GEARS Grants Management

Understanding Customer (Sponsor) Contracts for Grants

GEARS Grants integrates with GEARS Contracts, GEARS Project Costing, and GEARS General Ledger to enable bill processing for cash and letter of credit awards.

When you run the **Award Generation** process in GEARS Grants, the system automatically generates a contract. This contract represents your funded award and is required for processing any transactions against your award through to GEARS Billing and GEARS General Ledger. The **Contract - General** page captures the agreement information for your award as well as general information relating to the sponsor. The diagram below illustrates the integration between Grants and other GEASR modules.

Grants Integration



Lesson 1: Updating Grant Award Contract and Award Profile

Lesson Overview
The information that you create and maintain in the award profile establishes an award, which is defined as an executed agreement between an institution and a sponsor within the post-award system. An award is associated with one business unit, one billing sponsor, and one award sponsor. Each award must have at least one project and at least one activity. The system provides the bulk of this award setup information when you run the award generation process.

Through the Generate Award process, Grants writes award information to Contracts. This process creates a contract, adds contract lines to the contract, associates grant projects and activities to the contract line, and creates billing and revenue recognition plans. This integration with Contracts enables you to generate bills and recognize revenue for all transactions that are associated to the sponsored awards.

After the award generation process is complete, you can update and maintain award profile and project activity information. Similar to the award profile, most of the project activity and profile information is populated during the award generation process. All transactions associated with an award must be linked to a project and an activity to process the transactions against the award funding. Therefore, you must associate an activity with your award projects. When you run the generate award process, an activity is automatically created. During post award processing, you need to specify any additional activity information that was not already populated by the application.

Lesson Objectives
After completing this lesson, you will be able to:

- Manage milestones, Update Grant Award Contracts and Approve

1.1 Updating Grant Award Reimbursable Contract

After the award generation process is complete, you can update and maintain project activity information. Similar to the award profile, most of the project activity information is populated during the award generation process.

All transactions associated with an award must be linked to a project and an activity to process the transactions against the award funding. Therefore, you must associate an activity with your award projects.

When you run the generate award process, an activity is automatically created. During post award processing, you need to specify any additional activity information that was not already populated by the application.

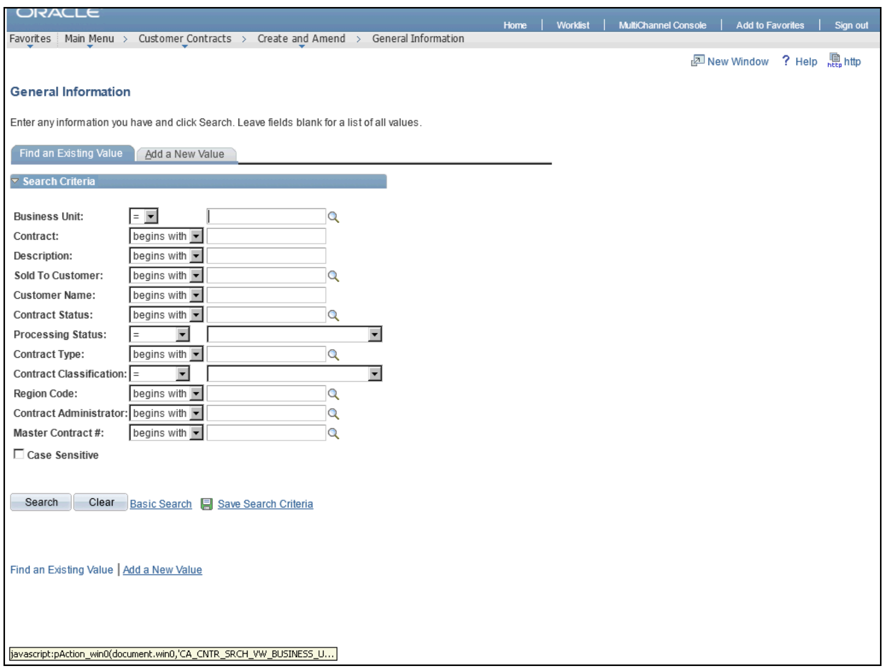
After completing this topic you will be able to:

- Update and review the Grant Award, Customer Contract, Grant Project and Grant Project Activity information.

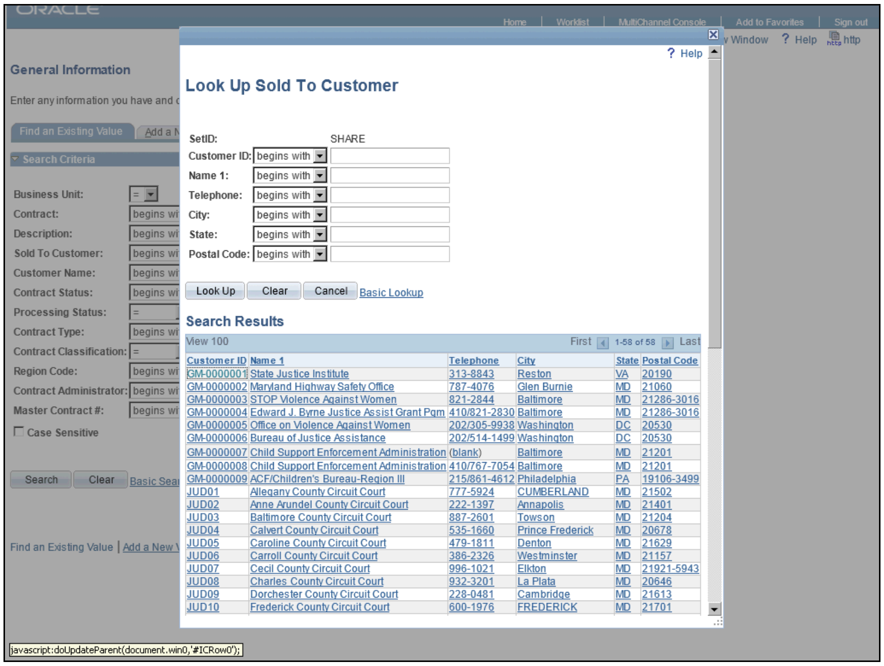
Procedure

In this topic you will update, review, and activate a grant reimbursable contract. You will be using information about a grant award that has already been created and is currently pending approval.

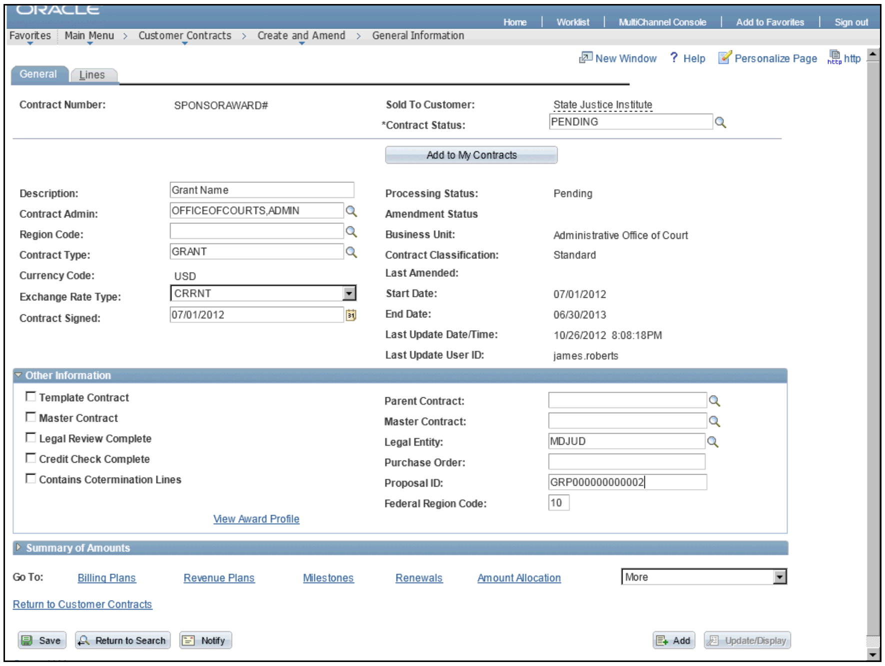
Step	Action
1.	Click the **Customer Contracts** link. Customer Contracts
2.	Click the **General Information** link. General Information



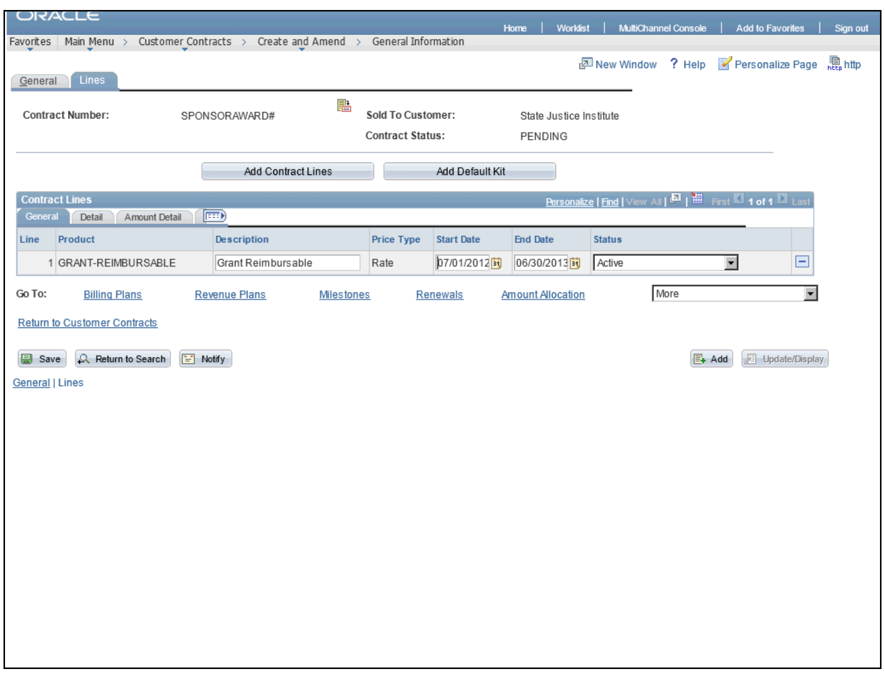
Step	Action
3.	Enter "**MDJUD**" into the **Business Unit** field.
4.	Click the **Look up Sold To Customer** button to focus on contracts related to a particular customer.



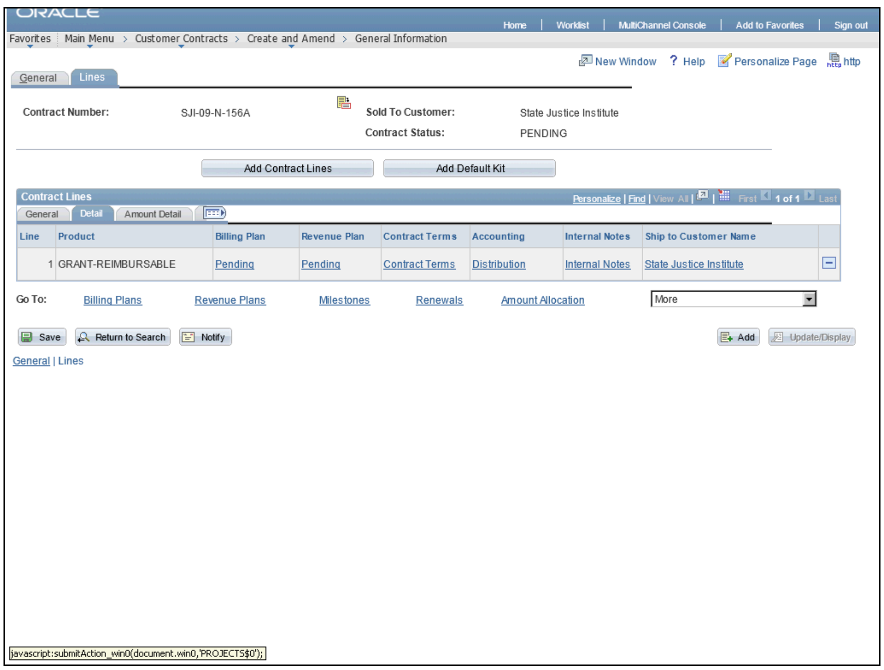
Step	Action
5.	The **Look Up Sold To Customer** appears. In this example, click the **State Justice Institute** link. State Justice Institute
6.	Click the **Search** button. Search
7.	Click the **SJI-09-N-156A** link. This link is associated with the 10COD-Teen Courts as seen in the description. Its contract status is currently **PENDING**. SJI-09-N-156A



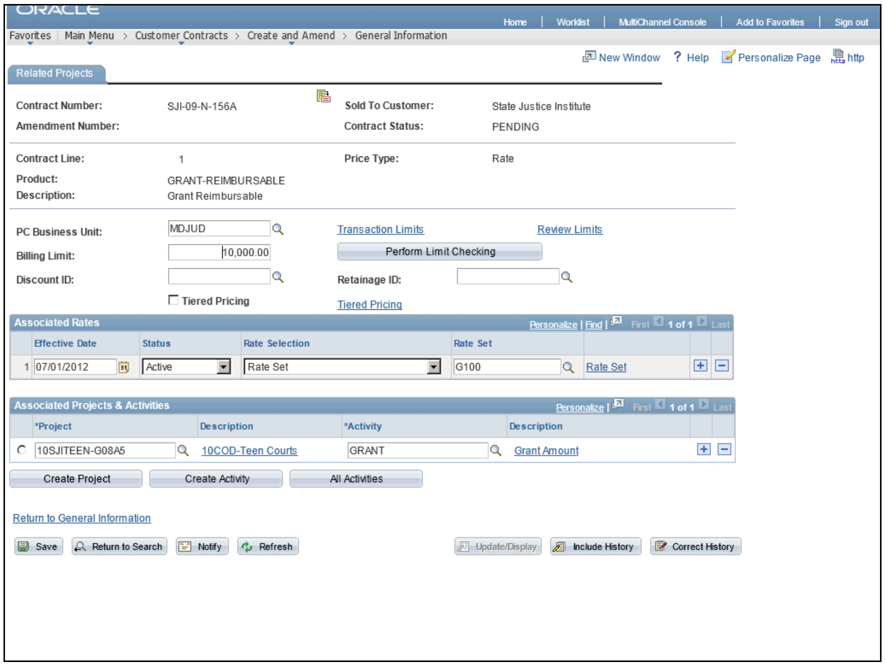
Step	Action
8.	You are now brought to the General Contract Information page. This contains all the details of the contract you have selected. Click the **Lines** tab to edit the contract at a more granular level. 



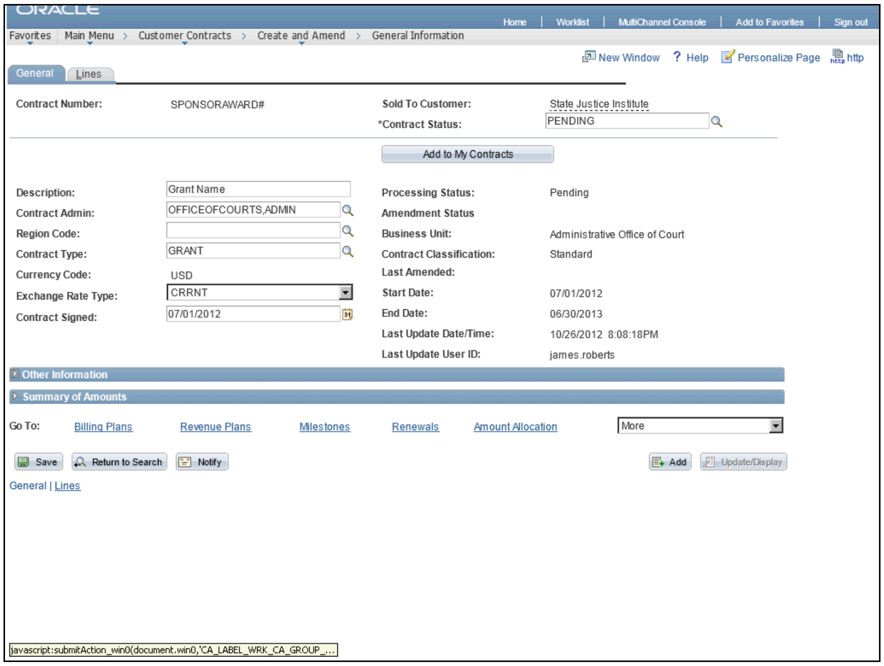
Step	Action
9.	Enter a valid **Start Date**. 07/01/2012
10.	Enter a valid **End Date**. 06/30/2013
11.	Click the **Detail** tab. Detail



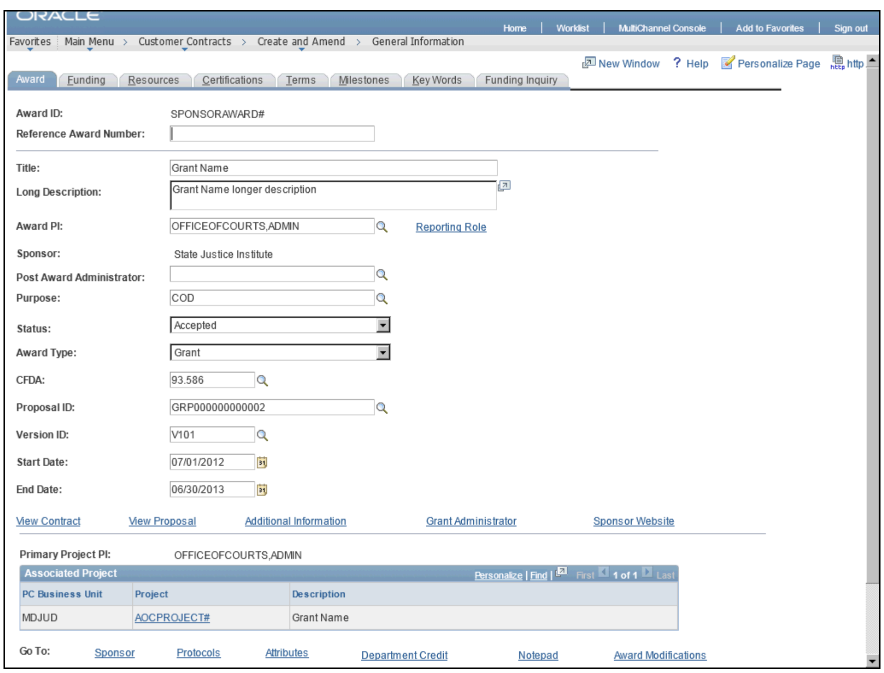
Step	Action
12.	Click the **Contract Terms** link. Contract Terms



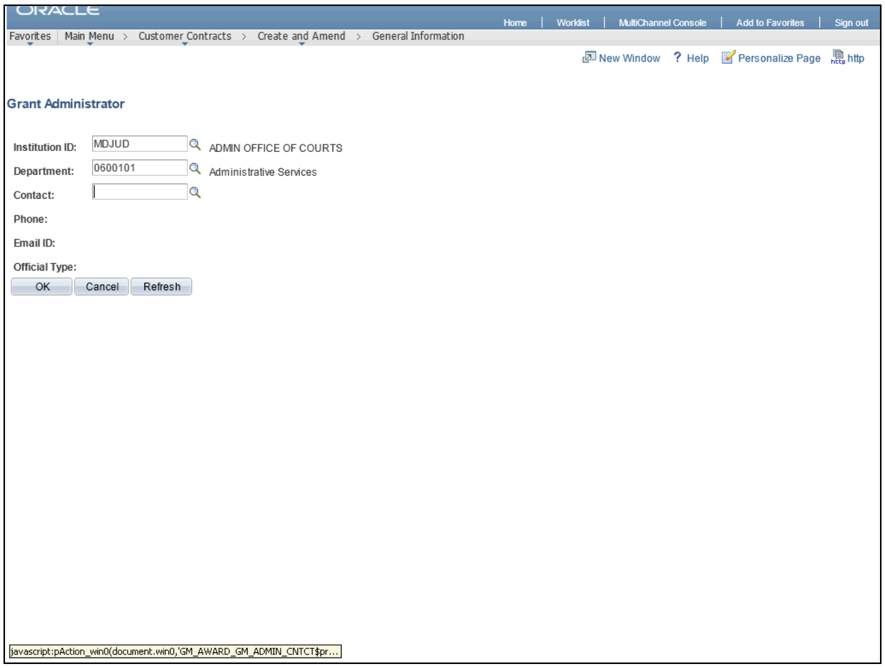
Step	Action
13.	Enter the desired information into the **Billing Limit** field. Enter "**1000000**". You are now making the Contract limit $100,000. Any billable expense transactions that cause the total expenses to exceed this limit will create over the limit transactions and not billable transactions.
14.	Enter the desired information into the **Effective Date** field. Enter "**a valid effective date**".
15.	Click in the **Rate Set** field. Enter "**G100**" for example. **Note:** This value should have defaulted from the Grant business unit. G100
16.	Click on the **Look Up Project Button**. Click on a valid value e.g. "**AOCPROJECT#**". **Note:** This value should have defaulted from the Generate Award page. 
17.	Click on the **Look Up Grant Name Button**. Click on a valid value e.g. "**GRANT**". 
18.	Click the **Return to General Information** link. Return to General Information



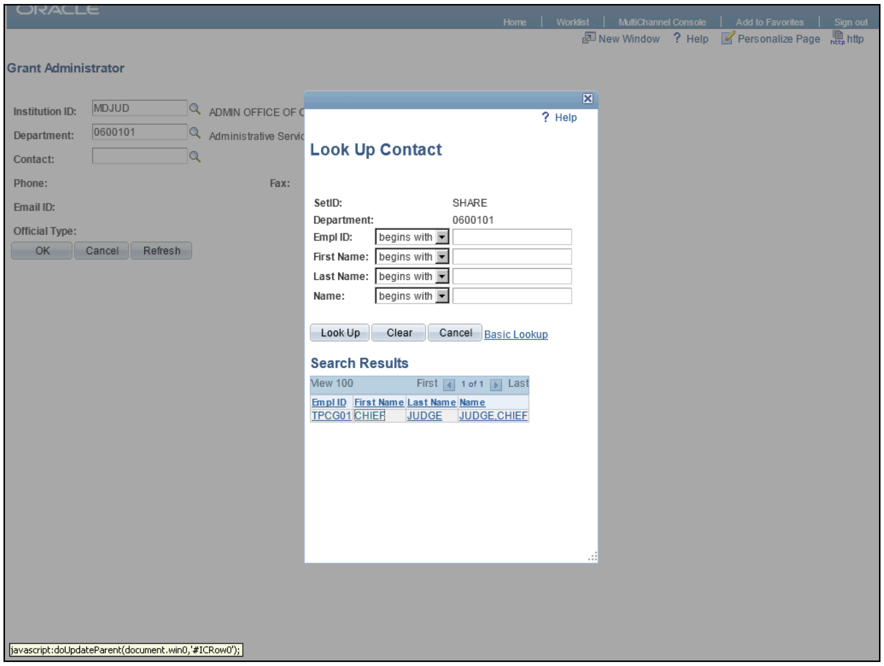
Step	Action
19.	Click the **Expand** button for Other Information.
20.	Click the **View Award Profile** link. View Award Profile

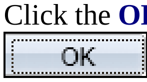
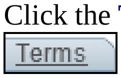


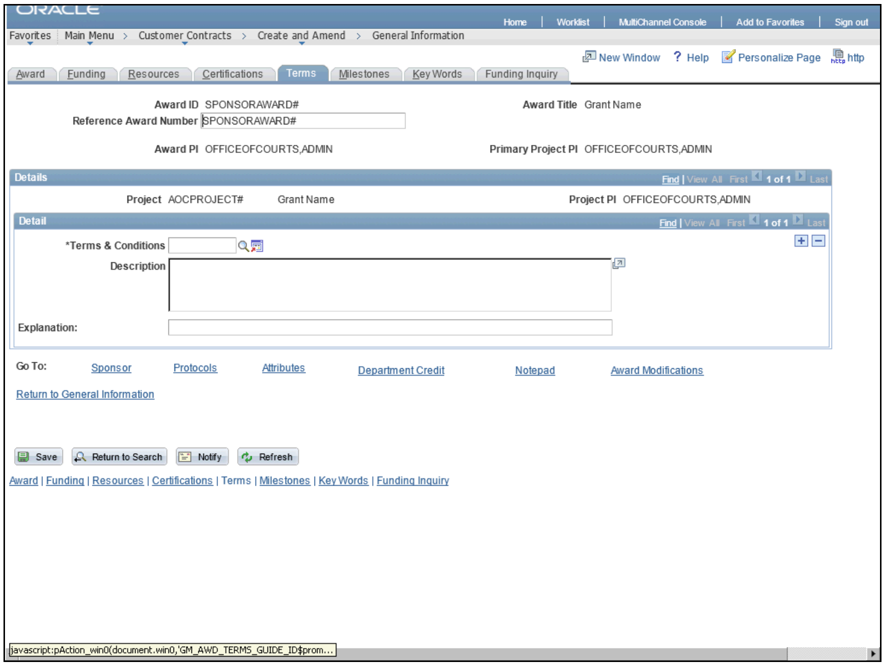
Step	Action
21.	You are now viewing the Award ID page. This page allows you to edit the award description, status, type and other related information. Enter the desired information into the **Reference Award Number** field. Enter "**SPONSORAWARD#**".
22.	Click on the **Grant Administrator** link.



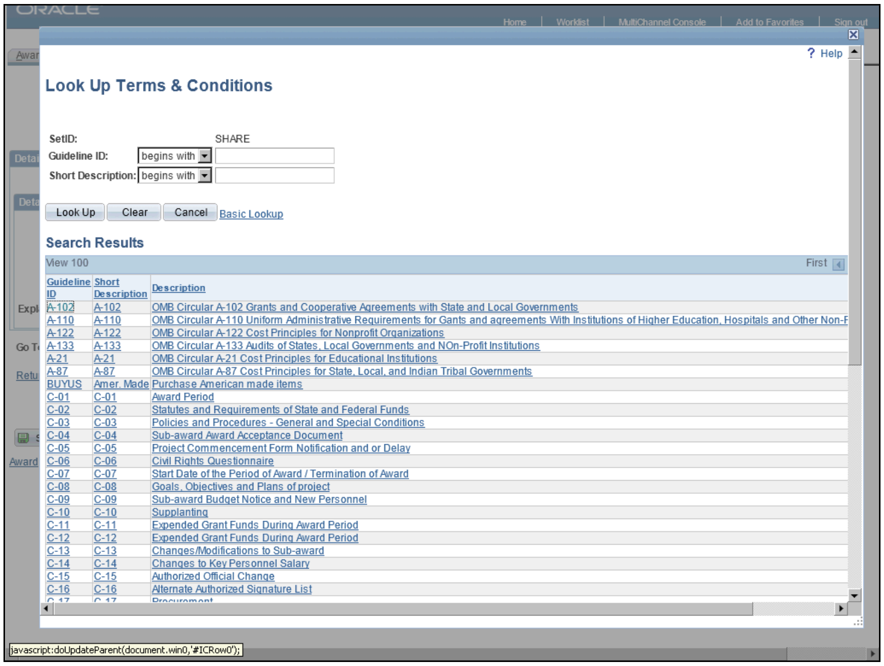
Step	Action
23.	Click the **Look up Contact** button. 



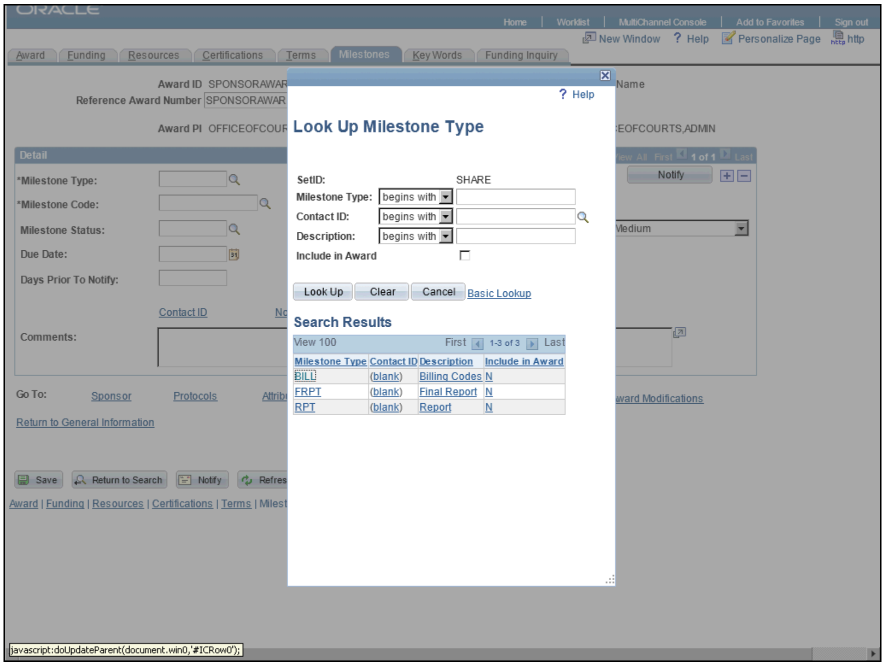
Step	Action
24.	In this example, Click the **CHIEF** link. The names that are available came from the Support Team-Team Member configuration. Use the value 'Default'. 
25.	Click the **OK** button. 
26.	Click the **Terms** tab. 

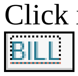


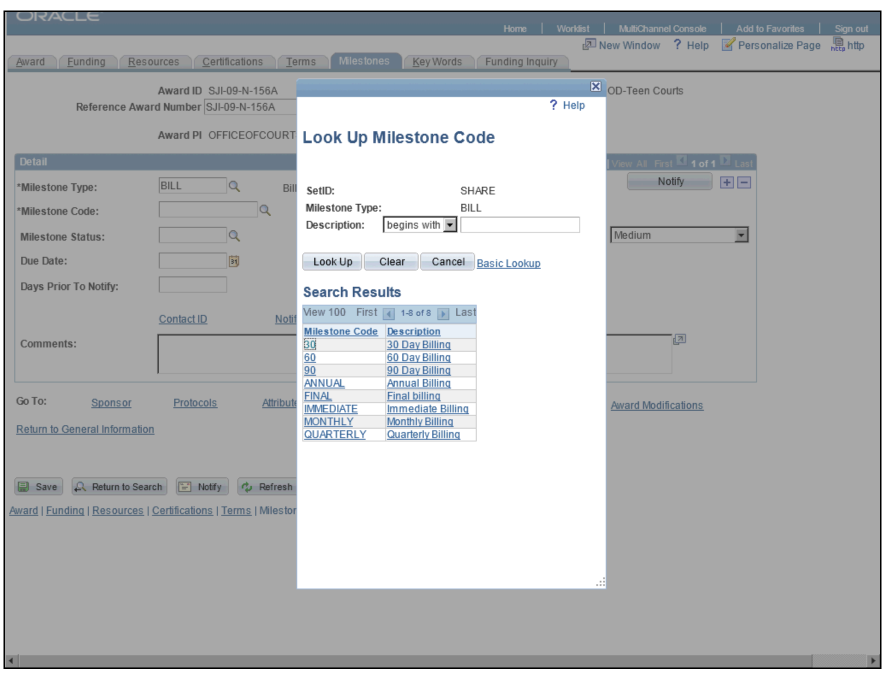
Step	Action
27.	You are now about to update the terms and conditions for the specific grant you are awarding. Click the **Look up Terms & Conditions** button. 



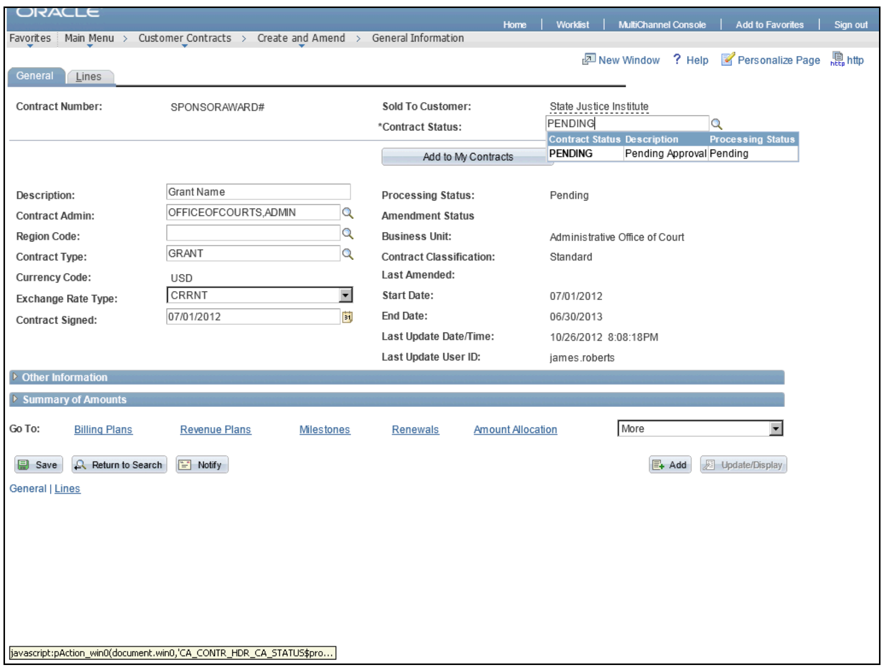
Step	Action
28.	Click the **A-102 Guideline ID** link. 
29.	Click the **Milestones** tab. 
30.	Click the **Look up Milestone Type** button. 



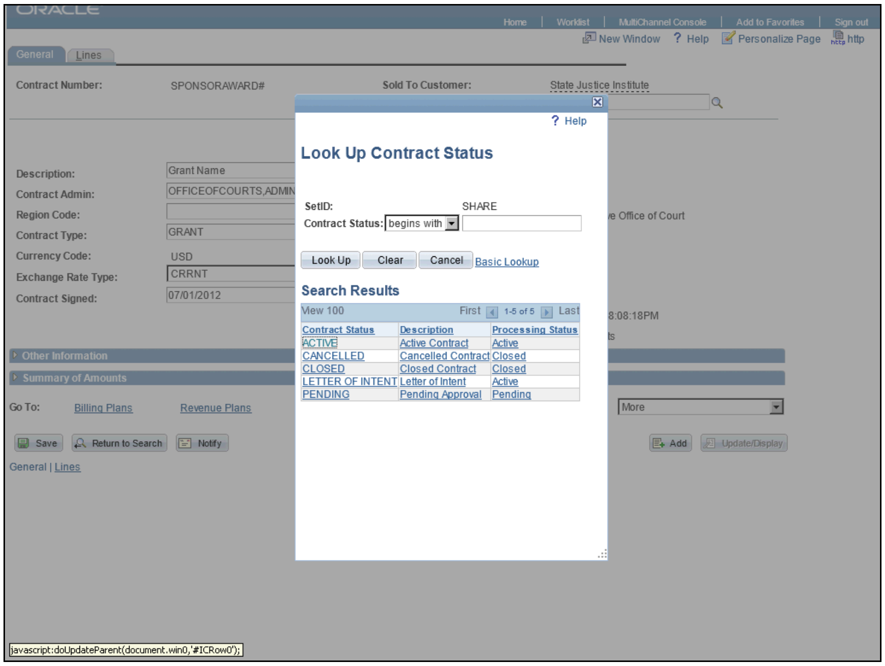
Step	Action
31.	Click in the **BILL Milestone Type** field. 
32.	Click the **Look up Milestone Code** button. 



Step	Action
33.	Click the **QUARTERLY** link. QUARTERLY
34.	Enter the desired information into the **Due Date** field. Enter "**a valid Due Date**".
35.	Enter the desired information into the **Days Prior To Notify** field. Enter "**15**" for this example.
36.	Click the **Save** button. Save
37.	Click the **Return to General Information** link. Return to General Information



Step	Action
38.	Click the **Look up Contract Status** button.



Step	Action
39.	Click the **ACTIVE** link. **Note:** The userid security may need to be changed to allow processing to occur. ACTIVE
40.	Verify that the Processing Status has changed to **ACTIVE.** Once you are finished reviewing the information you have just entered, click the **Save** button.
41.	You have successfully completed the *Updating Grant Award Contract & Approve* topic. You have learned how to: - Update a grant customer contract - Activate the customer contract **End of Procedure.**

Lesson 2: Monitoring Grant Activity

Lesson Overview
Project analysis is the process of analyzing internal or external projects to measure actual and budgeted costs. Within Project Costing, you will periodically assess project data as you accumulate resource transactions. Project Costing includes a variety of project analysis procedures to help you review and update the project data.

Lesson Objectives
After completing this lesson, you will be able to:

- Review and analyze Project Costing, Grant, Contract and Billing information for your grant

2.1 Reviewing Project Costing Information

Project Costing provides several different ways to analyze project data. Before you can begin analyzing project data, you must create at least one project, project activities, and transactions that have been assigned resource IDs. Once you establish a project and enter data directly though interfaces with other GEARS applications, you can use the pages in Project Costing to view a list of all project manager projects, display real-time project information that is pulled from the project summary tables, and display all resource transactions for a selected project.

In this topic the Manager Transaction Review and Flexible Analysis features for analyzing project data will be explored.

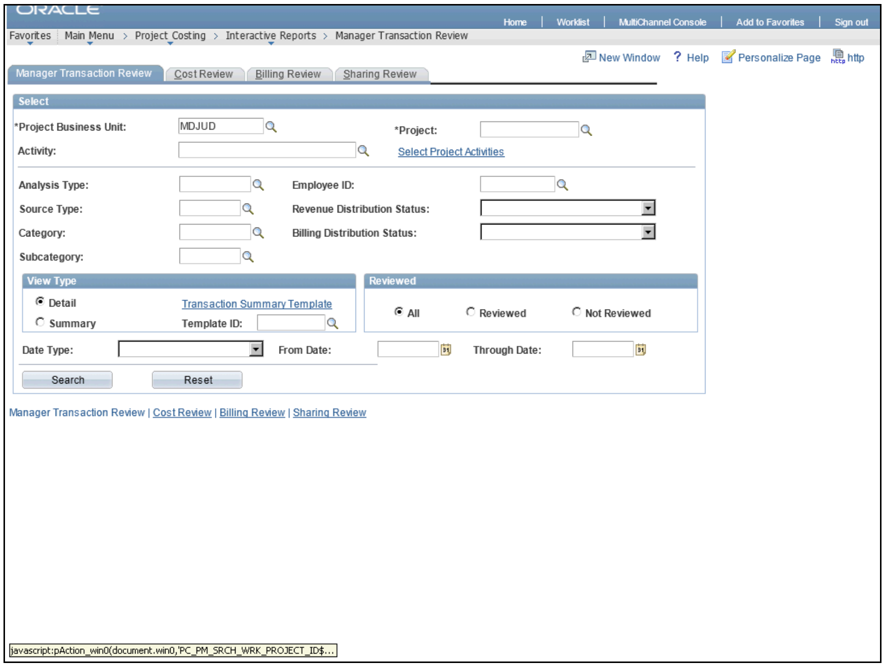
After completing this topic you will be able to:

- Use the Manager Transaction Review and Flexible Analysis to view and analyze project data.

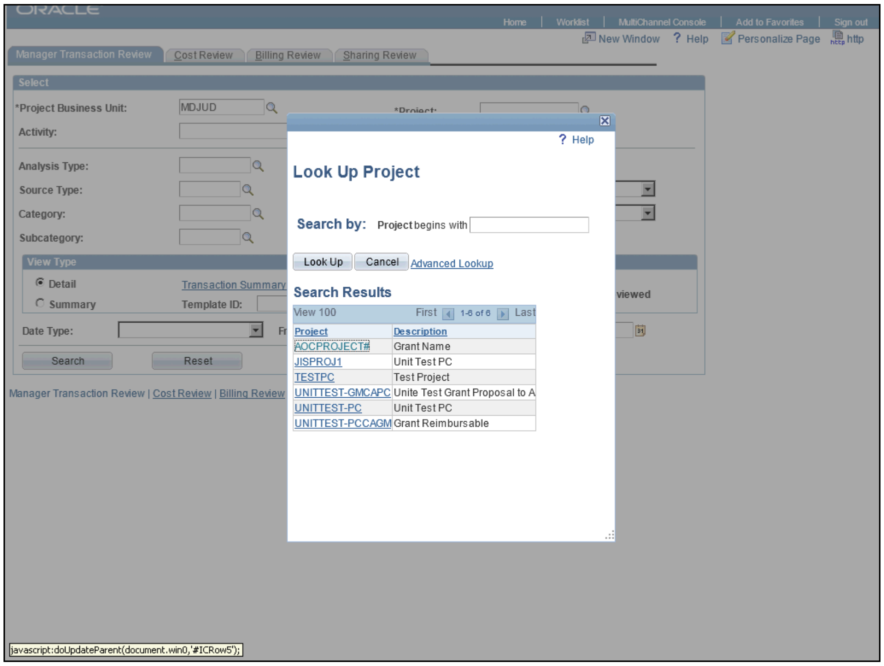
Procedure

In this topic, you will review and verify project costing information that has already been generated.

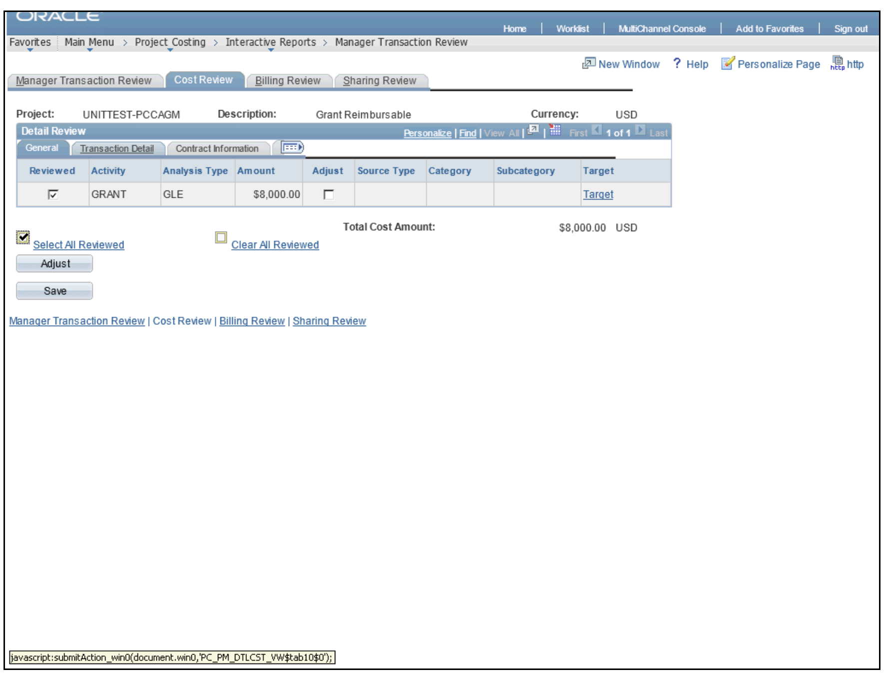
Step	Action
1.	Click the **Project Costing** link. ▷ Project Costing
2.	Click the **Interactive Reports** link. Interactive Reports
3.	Click the **Manager Transaction Review** link. Manager Transaction Review



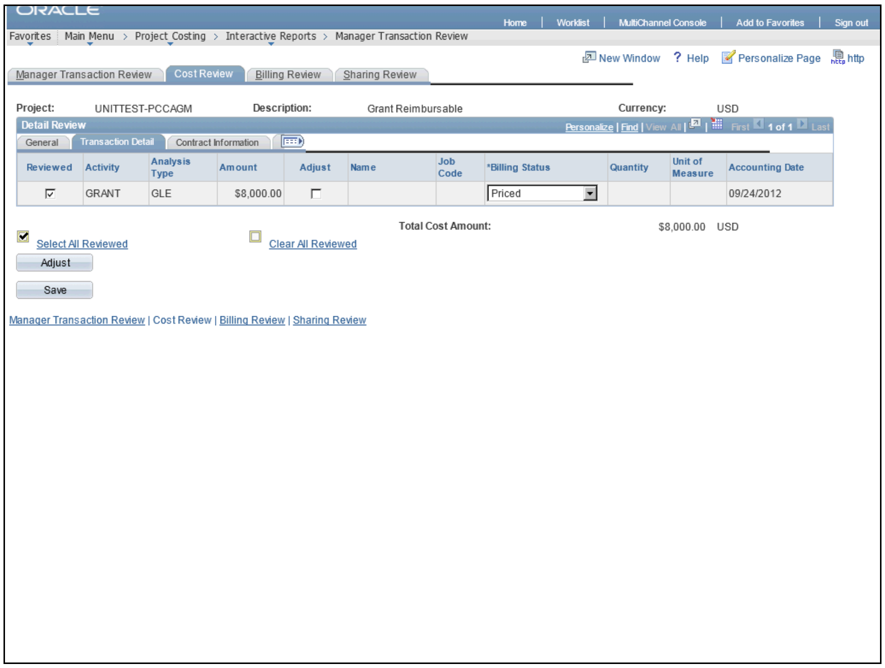
Step	Action
4.	You are now viewing the Manager Transaction Review page, which contains information regarding grant or project amount, billing and sharing status. Click the **Look up Project** button. 



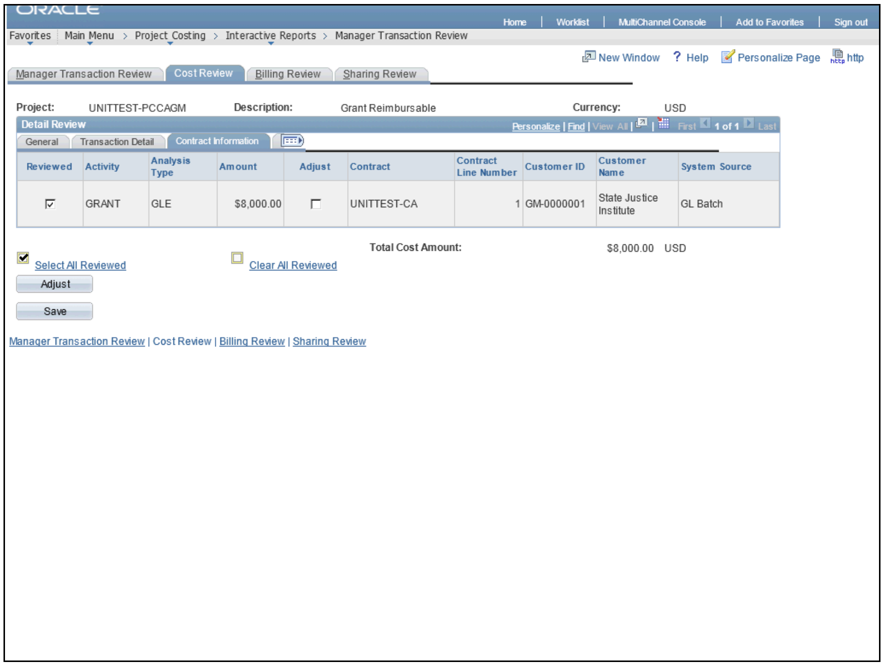
Step	Action
5.	Click the **UNITTEST-PCCAGM** link. UNITTEST-PCCAGM
6.	Click the **Search** button. Search



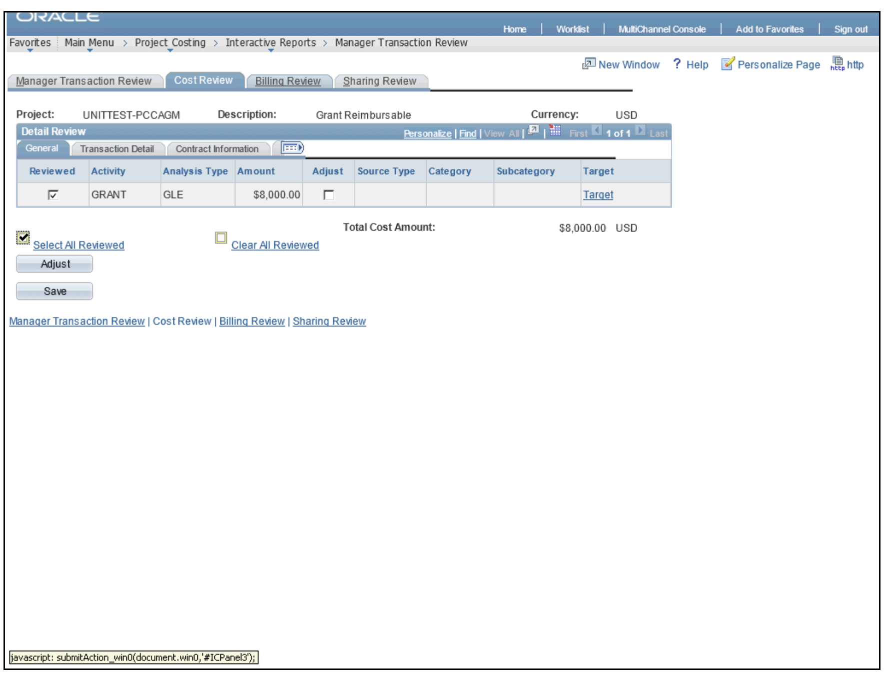
Step	Action
7.	Click the **Transaction Detail** tab. Transaction Detail



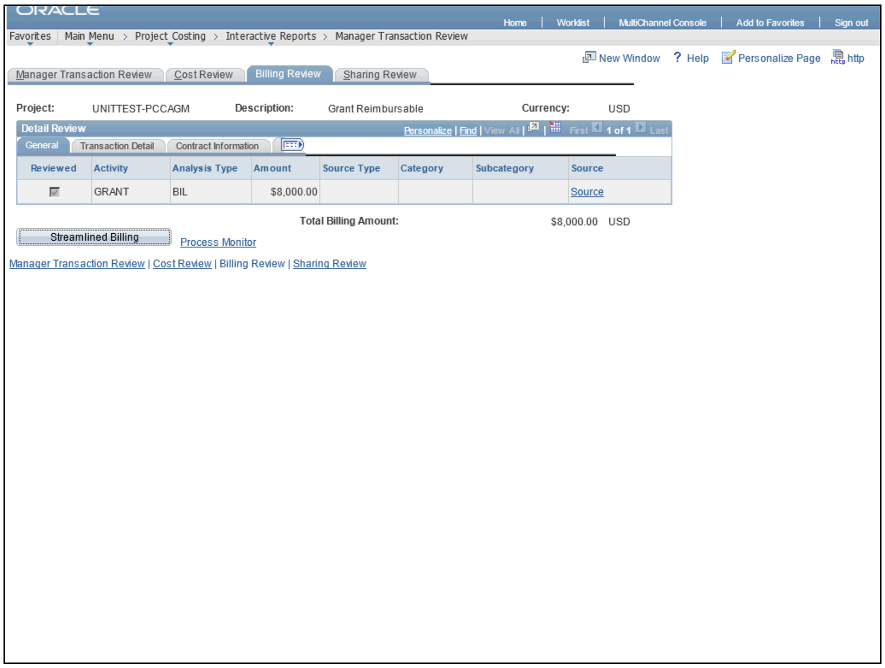
Step	Action
8.	Review the information on this tab. Be sure that the **Reviewed Option** is selected after you review it. Click the **Contract Information** tab. Contract Information



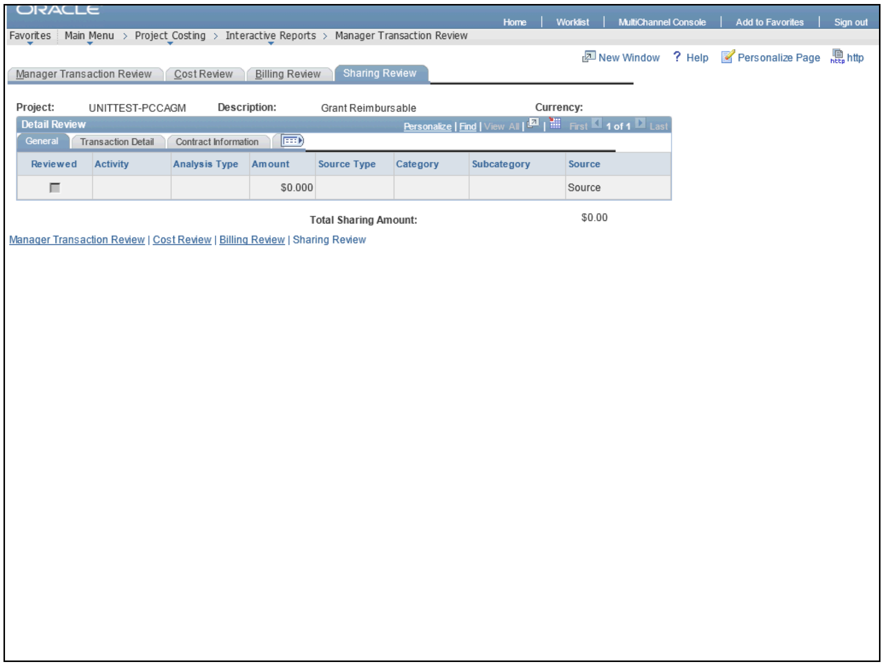
Step	Action
9.	Again, review this information and verify that all the fields are filled. Once reviewed, make sure the **Reviewed Option** is selected. Click the **Cost Review** tab. Cost Review

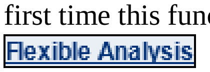


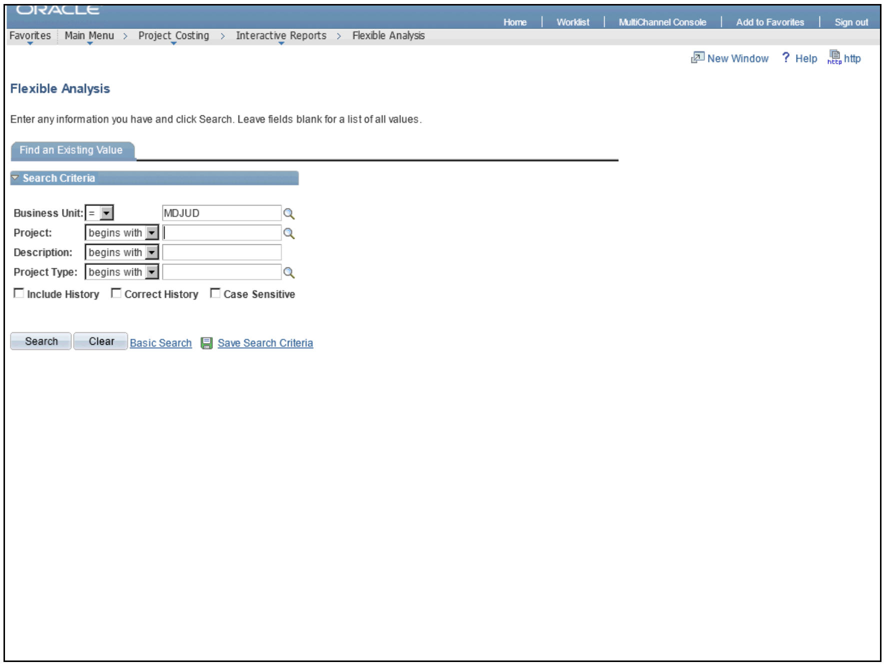
Step	Action
10.	Click the **Billing Review** tab. Billing Review



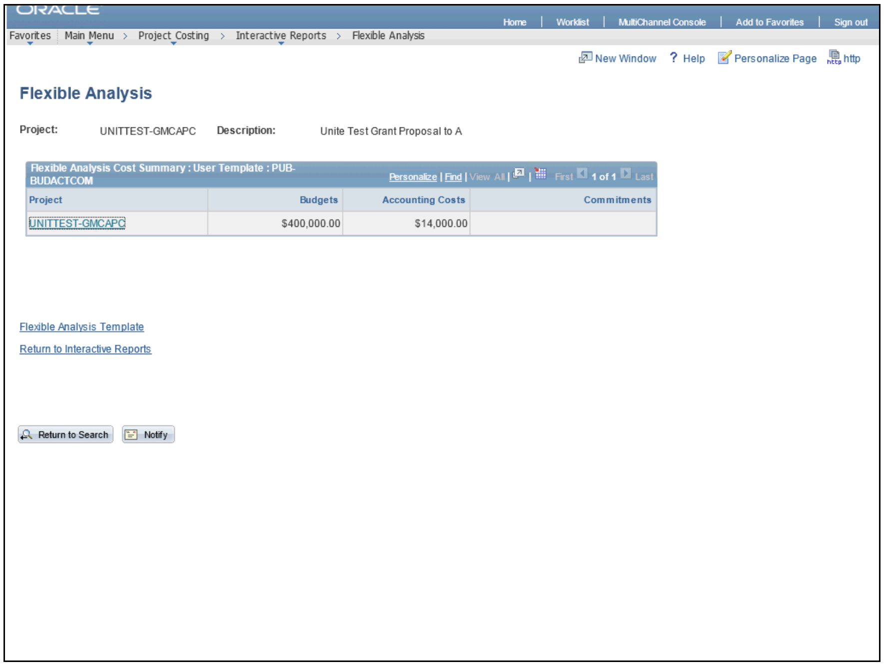
Step	Action
11.	Review the Billing information on this page. Click the **Sharing Review** tab. Sharing Review



Step	Action
12.	Once you have reviewed the Cost, Billing and Sharing fields click the **Home** link to analyze the information. 
13.	Click the **Project Costing** link. 
14.	Click the **Interactive Reports** link. 
15.	Click the **Flexible Analysis** link. **Note:** A default template needs to be setup the first time this functionality is used. 



Step	Action
16.	Click the **Look up Project** button.
17.	Click the **UNITTEST-GMCAPC** link. UNITTEST-GMCAPC
18.	Click the **Search** button. Search



Step	Action
19.	The **Flexible Analysis** page allows you see your budget versus cost for the particular Project you have selected. The Flexible Analysis Template will need to be created before this information will be displayed. Click the **Return to Interactive Reports** link. Return to Interactive Reports
20.	You have successfully completed *Reviewing Project Costing Information.* You have learned how to: - Review your Project Costing information. **End of Procedure.**

2.2 Reviewing Grant Information

Once you implement Grants and begin generating proposals, awards, and budgets, you can review the inventory of awards and proposals as well as view the projected budget and revenue information and variances in budgeted and actual amounts.

In this topic you will review award inventories, projected budget and revenue information, project variances, and proposal inventories.

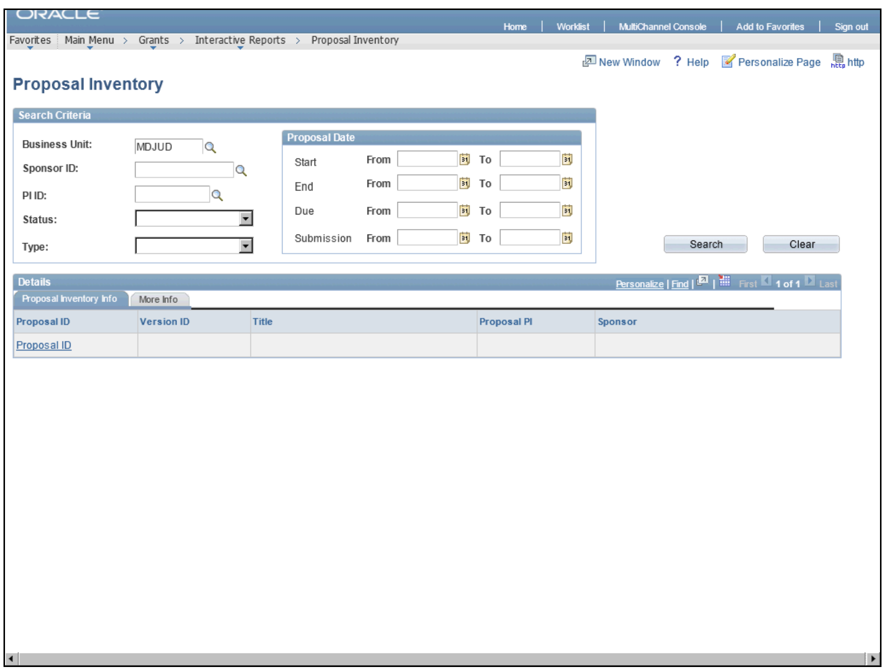
After completing this topic you will be able to:

- Navigate through and review award inventories, projected budget and revenue information, project variances, and proposal inventories.

Procedure

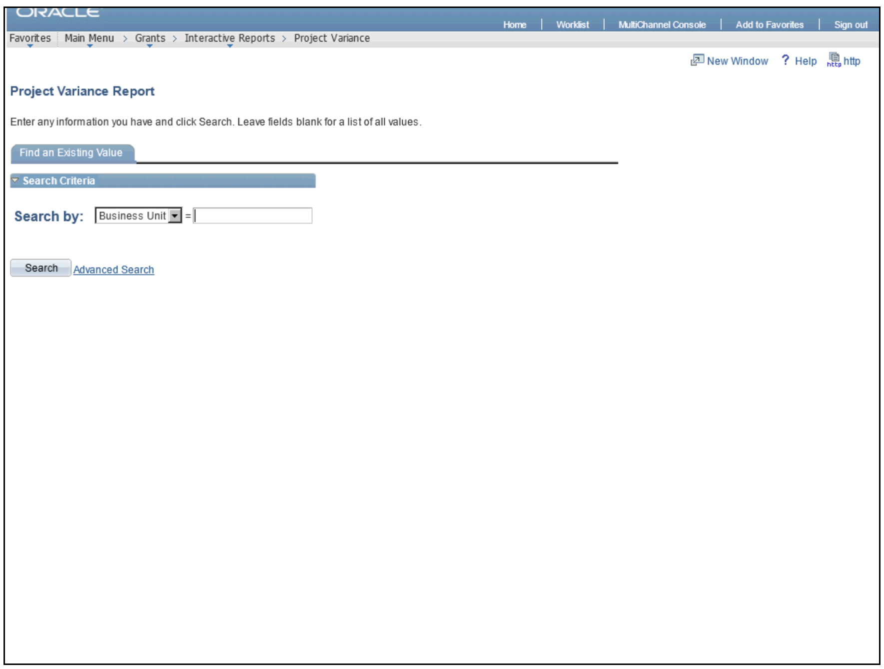
In this topic, you will be reviewing previously loaded Grant information.

Step	Action
1.	Click the **Grants** link. Grants
2.	Click the **Interactive Reports** link. Interactive Reports
3.	Click the **Proposal Inventory** link. Proposal Inventory

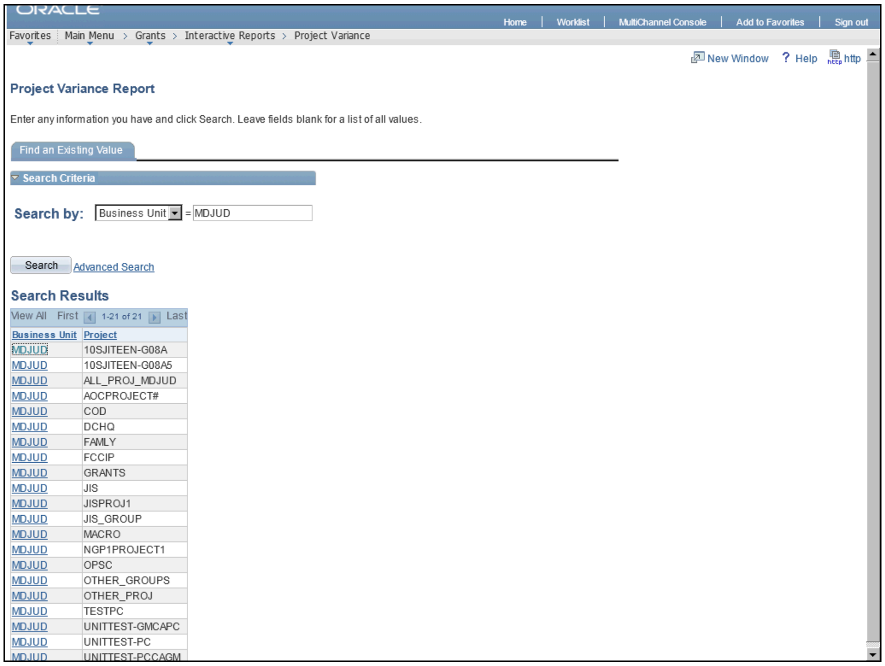


Step	Action
4.	In order to search for the specific grant that we want to review, we need to identify certain criteria; starting with the Business Unit. **MDJUD** should show automatically in the Business Unit field. If not, enter **MDJUD,** then click the **Search** button. Search

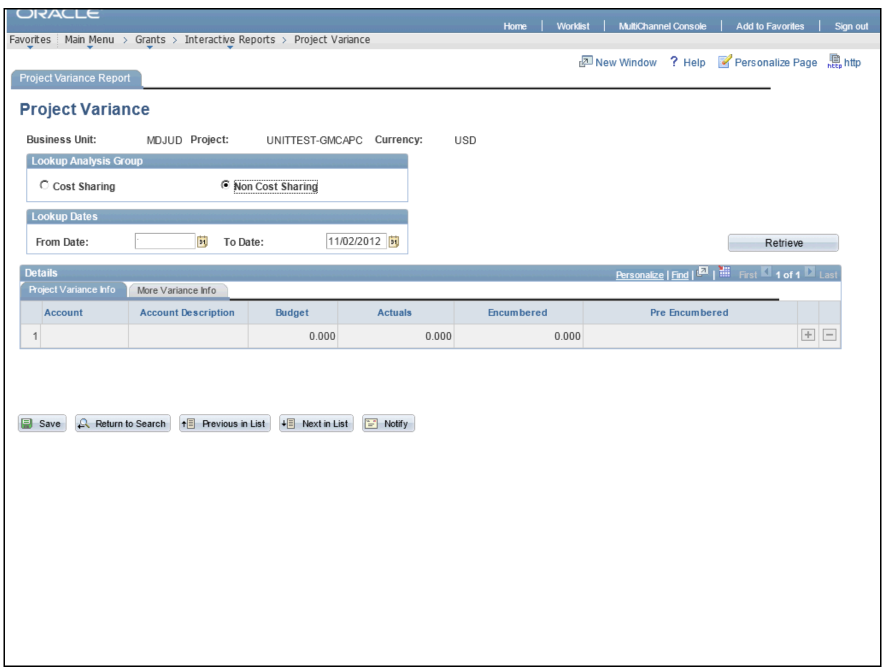
Step	Action
5.	Be sure that the Award ID "**UNITTEST-GMCAPC**" is displayed below as this is the Award you will be reviewing. Click the **More Info** tab for additional information. More Info
6.	Click the **Interactive Reports** menu. Interactive Reports
7.	Click the **Project Variance** menu. Project Variance



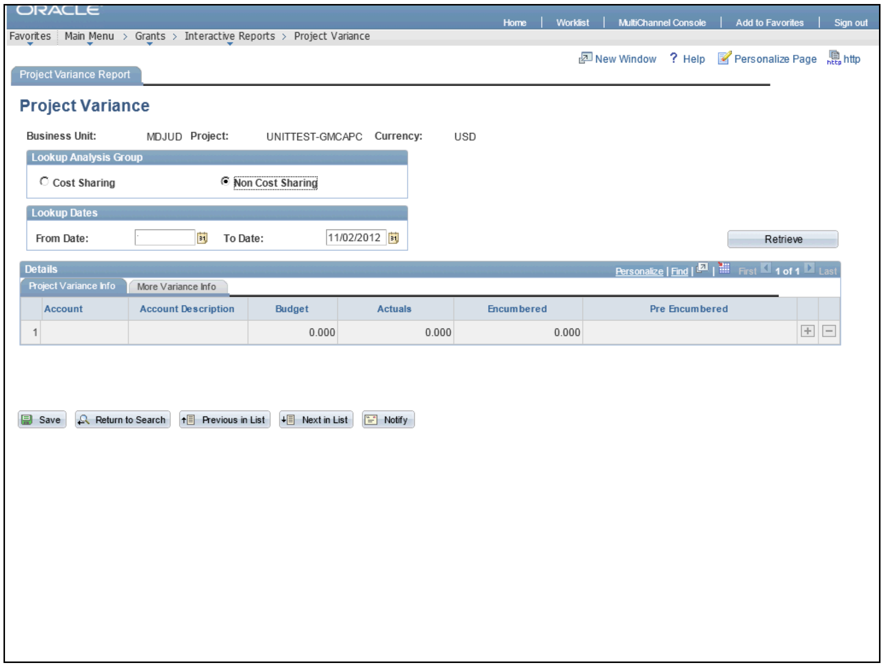
Step	Action
8.	Enter the desired information into the **=** field. Enter "**MDJUD**".
9.	Click the **Search** button. Search



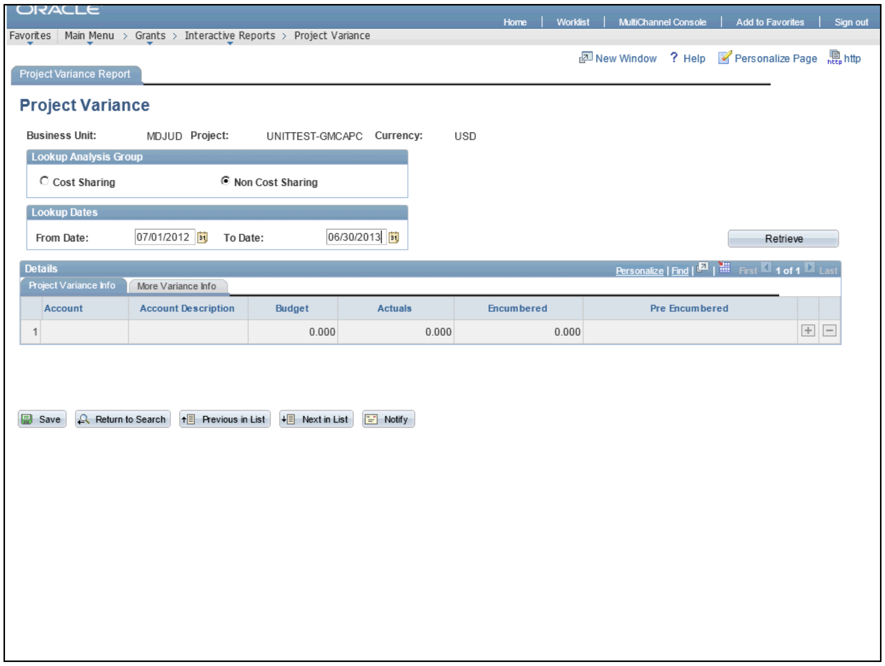
Step	Action
10.	Click the **MDJUD** link associated with the "**UNITTEST-GMCAPC**" Project. MDJUD



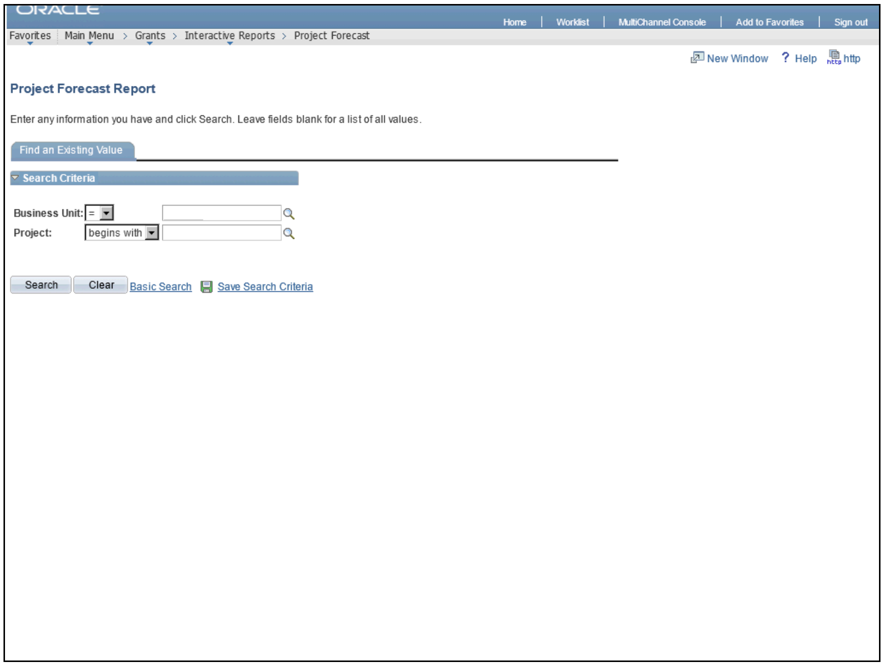
Step	Action
11.	Use the **Project Variance Report** page to review variances in budgeted and actual amounts as well as balances for selected projects.



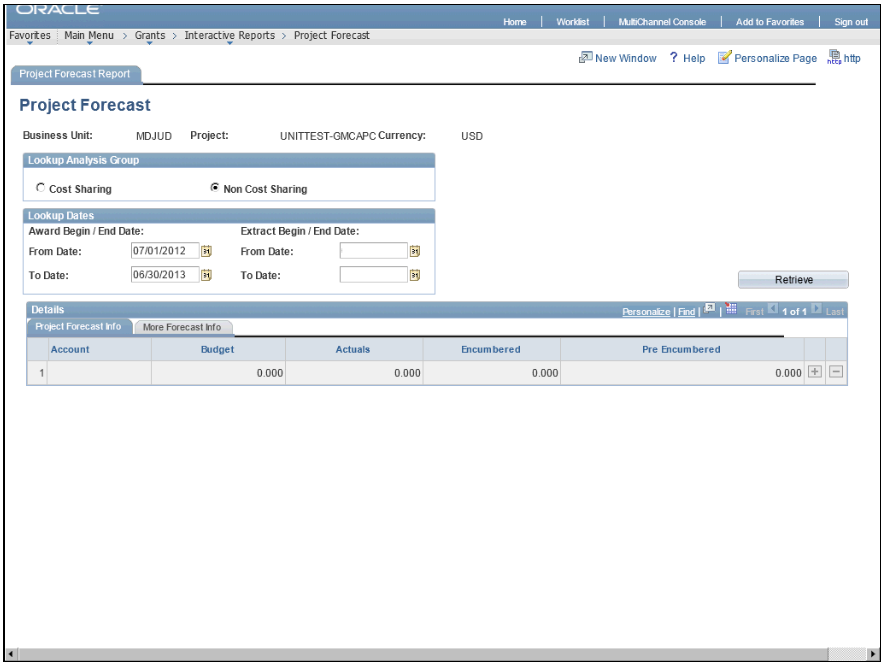
Step	Action
12.	Enter the desired information into the **From Date** field. Enter "**07/01/12**".
13.	Enter the desired information into the **To Date** field. Enter "**06/30/13**".



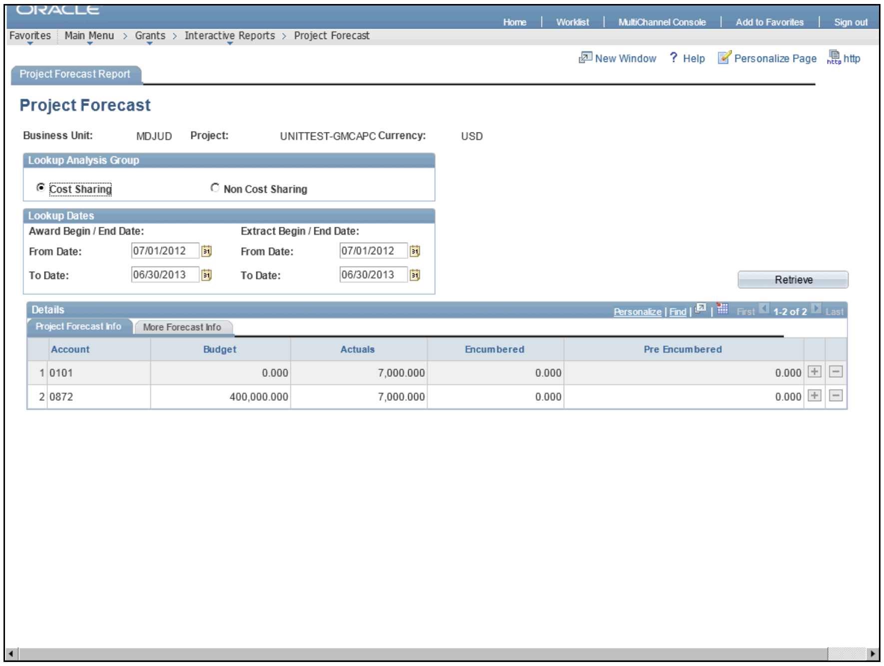
Step	Action
14.	Click the **Cost Sharing** option. 
15.	Click the **Retrieve** button. 
16.	Click the **Interactive Reports** menu. 
17.	Click the **Project Forecast** menu. 



Step	Action
18.	Enter the desired information into the **Look up Business Unit** field. Enter "**MDJUD**".
19.	Enter the desired information into the **Project** field. Enter "**UNITTEST-GMCAPC**".
20.	Click the **Search** button. 



Step	Action
21.	Use the **Project Forecast Report** page to review projected budget and revenue information for selected projects.
22.	Enter the desired information into the **From Date** field. Enter "**07/01/12**".
23.	Enter the desired information into the **To Date** field. Enter "**06/30/13**".
24.	Click the **Cost Sharing** option. 
25.	Click the **Retrieve** button. 



Step	Action
26.	You can now view the Grant Information in terms of budget amounts for the Project selected; in this case, "**UNITTEST-GMCAPC**".
27.	You have successfully completed *Reviewing Grant Information*. You have learned how to: - Review the grant information **End of Procedure.**

2.3 Reviewing Contract Information

In this topic the **Contracts Workbench** will enable you to view all the information related to Contracts, Grants, and Project Costing modules through a single workspace. You can view the current status or the required update to any major, related entity such as a contract line, a project, or an activity.

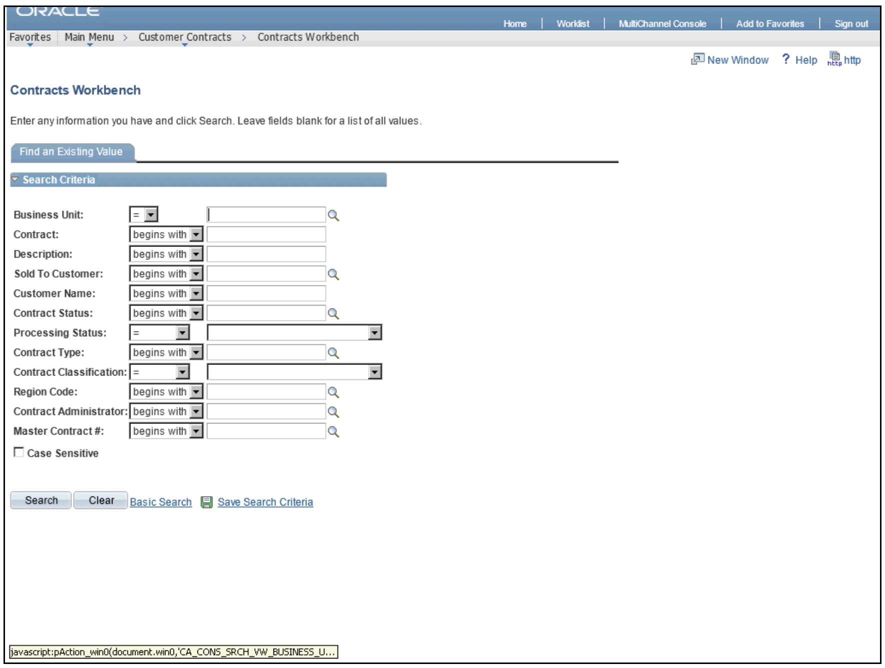
After completing this topic you will be able to:

- Navigate through and review Contracts, Grants and Project Costing information in one place.

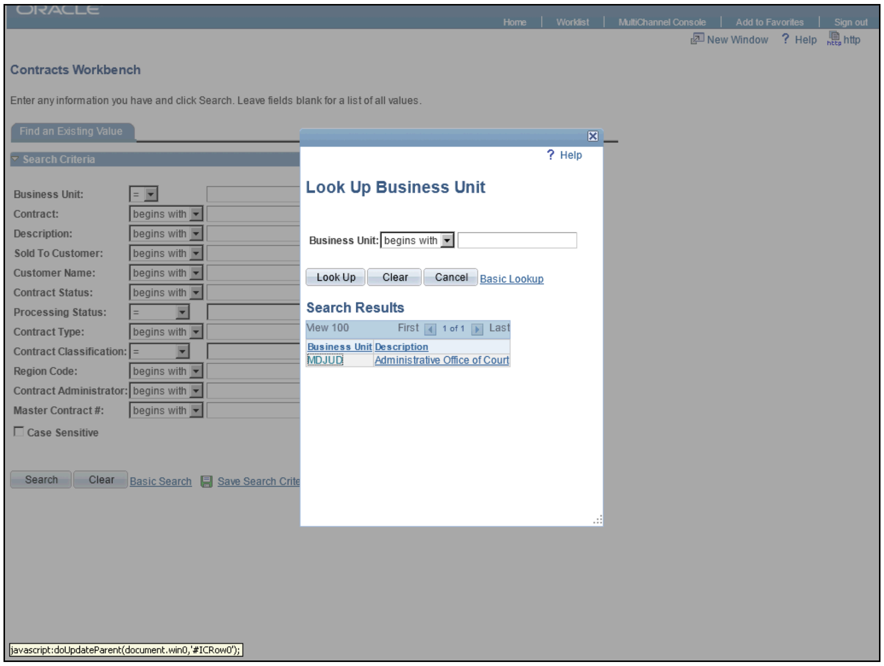
Procedure

In this topic, you will use the **Contracts Workbench** to view Contracts, Grants, and Project Costing information for a single grant. You can view the current status or the required update to any major, related entity such as a contract line, a project, or an activity.

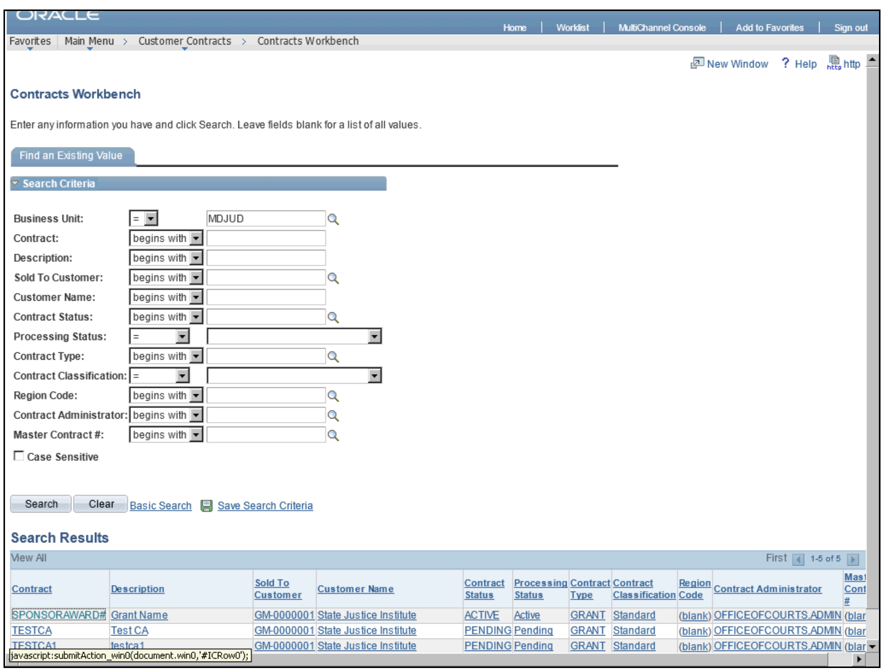
Step	Action
1.	Click the **Customer Contracts** link. Customer Contracts
2.	Click the **Contracts Workbench** link. Contracts Workbench



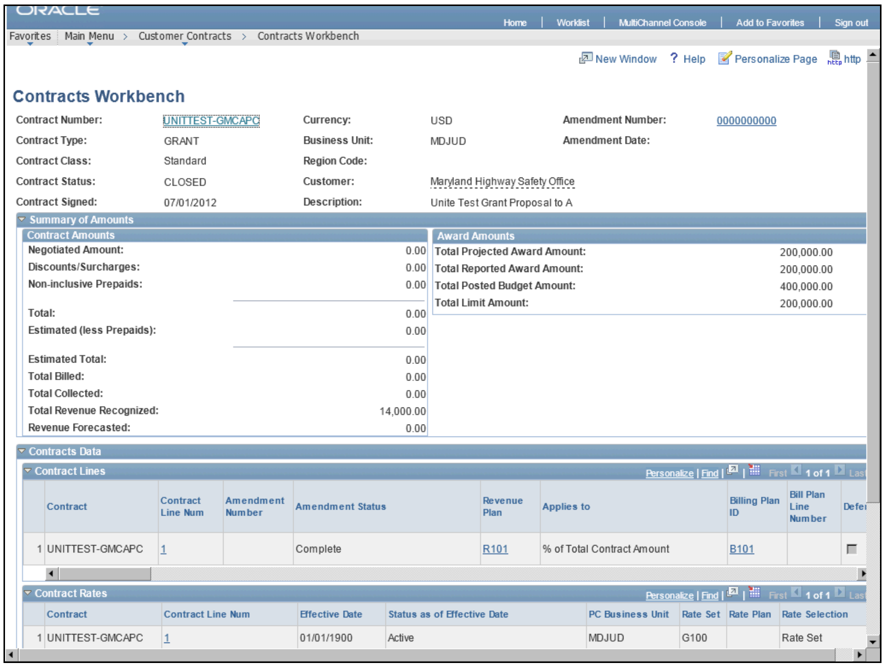
Step	Action
3.	Click the **Look up Business Unit** button.



Step	Action
4.	Click the **MDJUD** link. 
5.	Click the **Search** button. 



Step	Action
6.	Click the **SPONSORAWARD#** link. SPONSORAWARD#



Step	Action
7.	You are now viewing the Contracts Workbench. This page contains all the information for the contract in your project(s) in summary form and in greater detail. Move the scrollbar downward to review additional data.
8.	You can review Contract data by Line, Rate and Budget Limit. Click the **Return to Search** button. Return to Search
9.	You have successfully completed *Reviewing Contract Information.* You have learned how to: - Review contract information **End of Procedure.**

2.4 Reviewing Billing Information

The Billing module enables you to search for bills by specifying criteria. You can search for a single bill, a group of bills, a single bill line, or a group of bill lines. The pages within the Locate

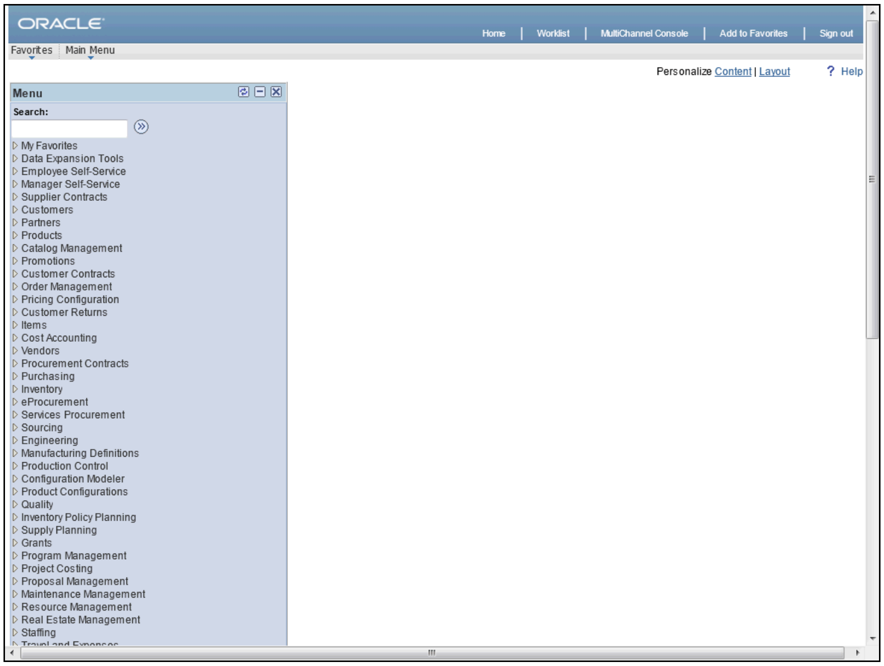
Bills menu enable you to search for bills and lines that have been invoiced or not invoiced and allow you to modify some information.

After completing this topic you will be able to:

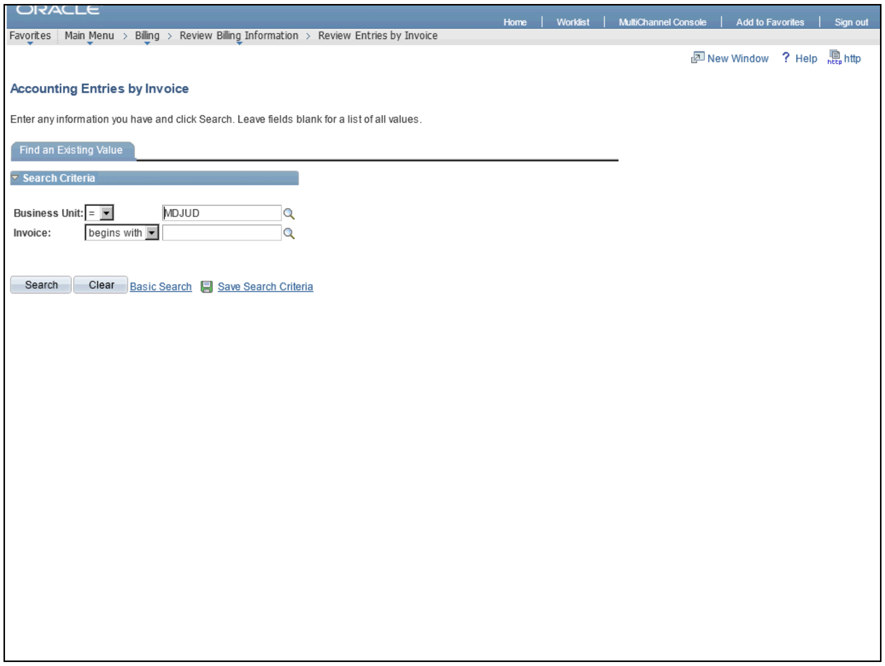
- Navigate through and review billing and invoice information.

Procedure

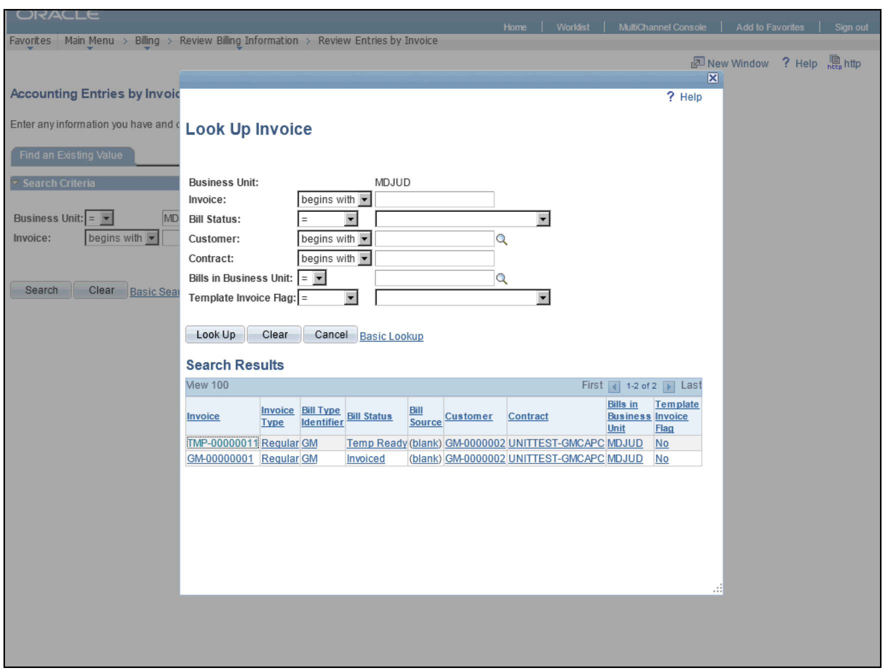
In this topic, you will search for bills and bill lines that have been invoiced (or not invoiced) to the grant sponsor.



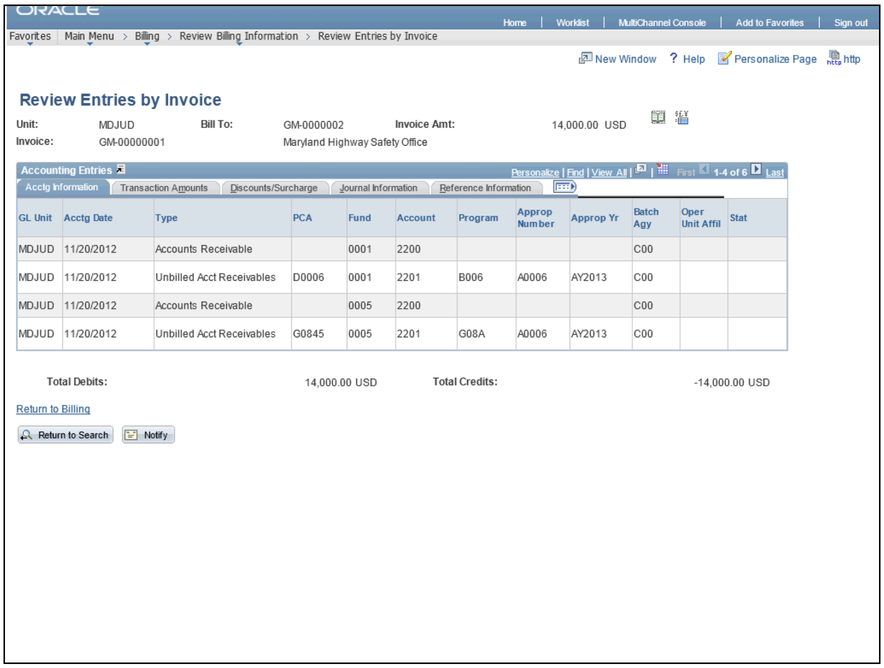
Step	Action
1.	Move the scrollbar downwards.
2.	Click the **Billing** link. Billing
3.	Click the **Review Billing Information** link. Review Billing Information
4.	Click the **Review Entries by Invoice** link. Review Entries by Invoice



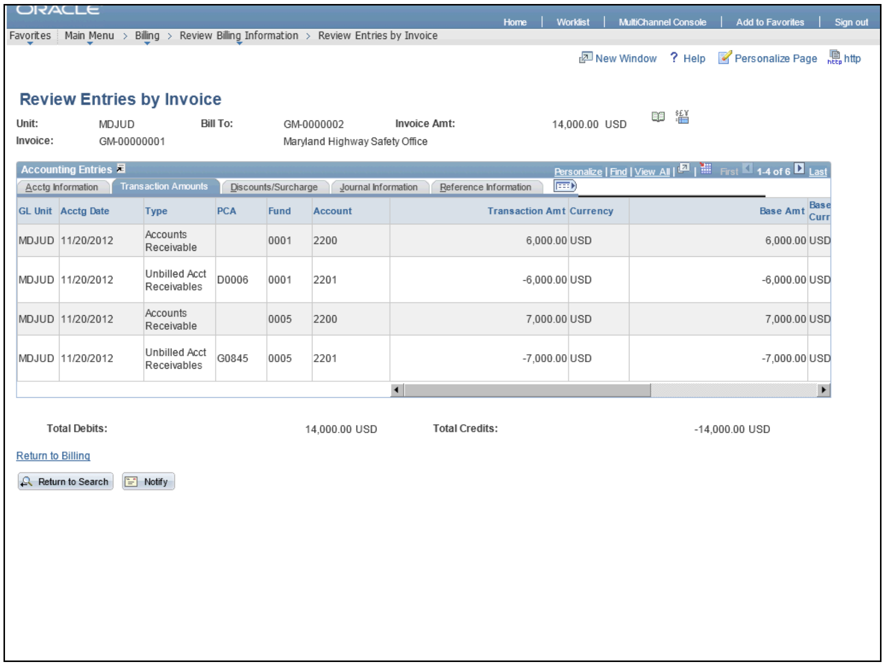
Step	Action
5.	Click the **Look up Invoice** button. 



Step	Action
6.	Click the **GM-00000001** link. GM-00000001
7.	Click the **Search** button. Search



Step	Action
8.	The *Review Entries by Invoice* page contains all of the information attached to a particular invoice. In this case we are looking at Invoice "GM-00000001". Click the **Transaction Amounts** tab to review more information. Transaction Amounts



Step	Action
9.	You can review each transaction separately. Click the **Journal Information** tab. 
10.	The Invoice Journal Information displays additional information, like Journal Date and Journal ID, if it is available.
11.	You have successfully completed *Reviewing Billing Information.* **End of Procedure.**

Lesson 3: Closing a Grant, Contract & Project

Lesson Overview
Remember that your contract is your award. All billing and revenue transactions must flow through the contract to reach the Billing and General Ledger modules. Therefore, a contract with a status of CLOSED will not allow any transactions to be processed against it. Before you can change a contract to a CLOSED status, first close out any billing and revenue recognition plans associated with the contract or award lines that are active and in progress. When you change the status of the contract to CLOSED, the system runs a series of edit checks to verify that there are no billing or revenue recognition plans associated with the contract that are in progress. An error message appears if this is the case.

In this lesson, you will perform the following tasks:
- Finalize Reconciliation Report
- Close Project
- Close Contract
- Close Grant, A133 Audit Report

Lesson Objectives
After completing this lesson you will be able to:

- Close out an award and its associated projects.

3.1 Delivered Project Costing Reports

Once you establish and/or update grant projects, you can view a list of all project manager projects, display real-time project information that is pulled from the project summary tables, and display all resource transactions for a selected project. The **Transaction Level Report** lists information about the transactions that reference a specific grant project or all grant projects for the Judiciary business unit (MDJUD). The report includes the activity type, activity ID, source type, category, and subcategory for transactions for all projects or specified projects for a business unit. Optionally, you can generate the report to list projects for a specific date range or budget, cost, and revenue analysis group.

Before generating the Transaction Level Report, you must run the **Report Summarization** process to populate the Project Transaction report table with transactions.

The Report Summarization process automatically summarizes transaction information for the following fields:

- BUSINESS_UNIT
- PROJECT_ID
- ACTIVITY_ID
- ANALYSIS_TYPE
- CURRENCY_CD

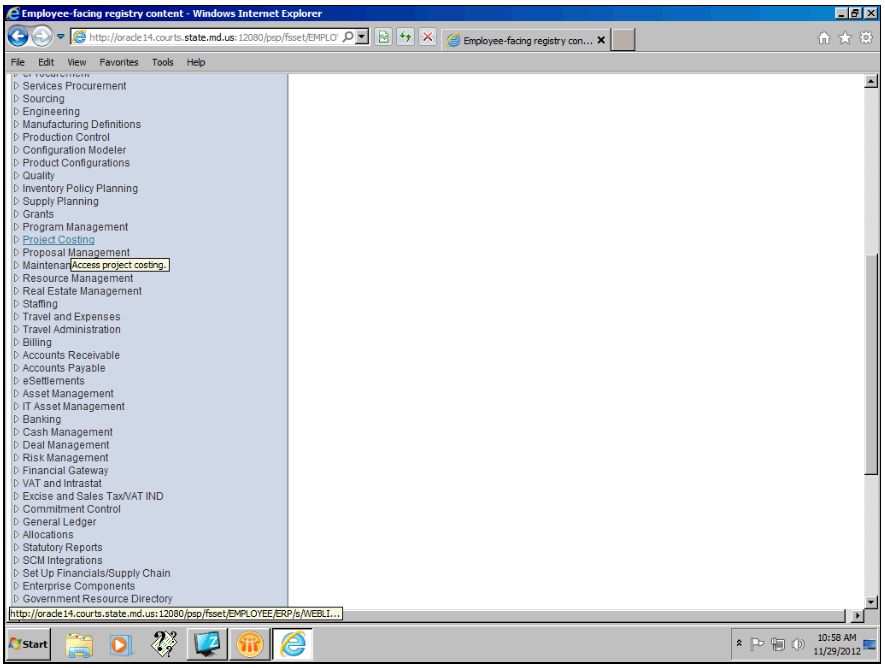
After completing this topic, you will be able to:

- Run the Report Summarization process to populate the reporting table with transactions

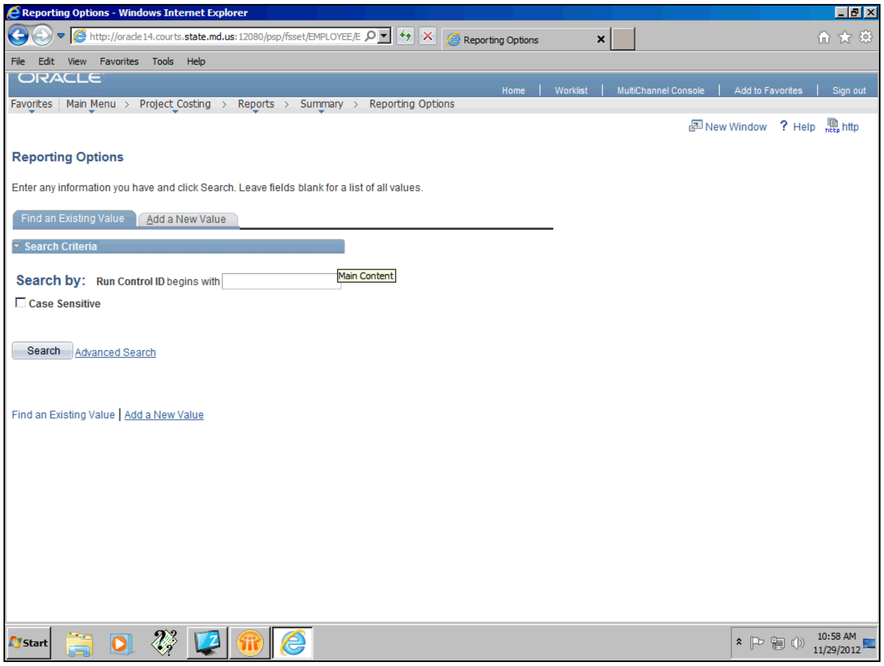
- Generate the Transaction Level Report

Procedure

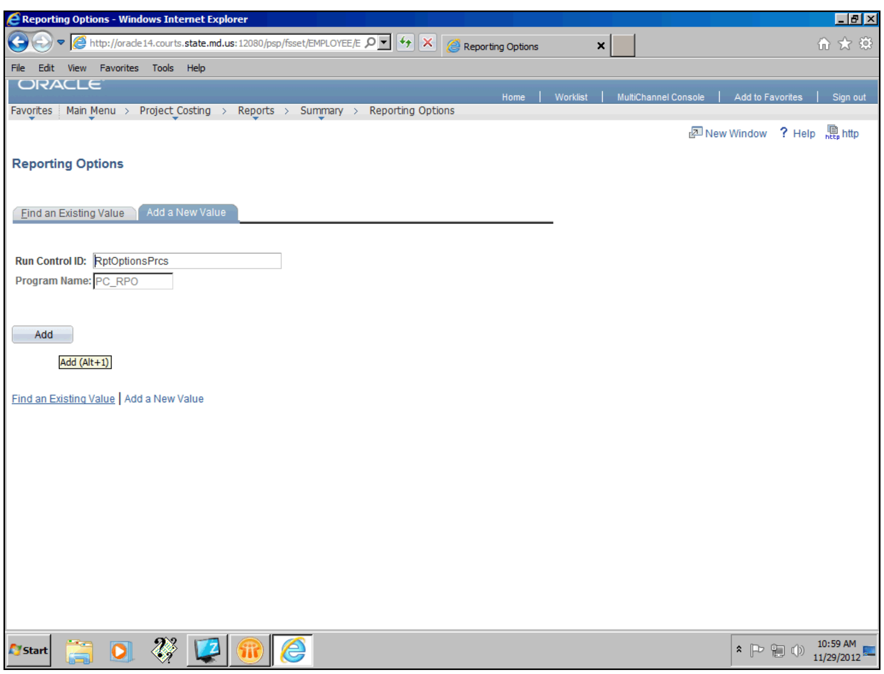
In this topic, you will run the Report Summarization process. You will then generate the Transaction Level Report.



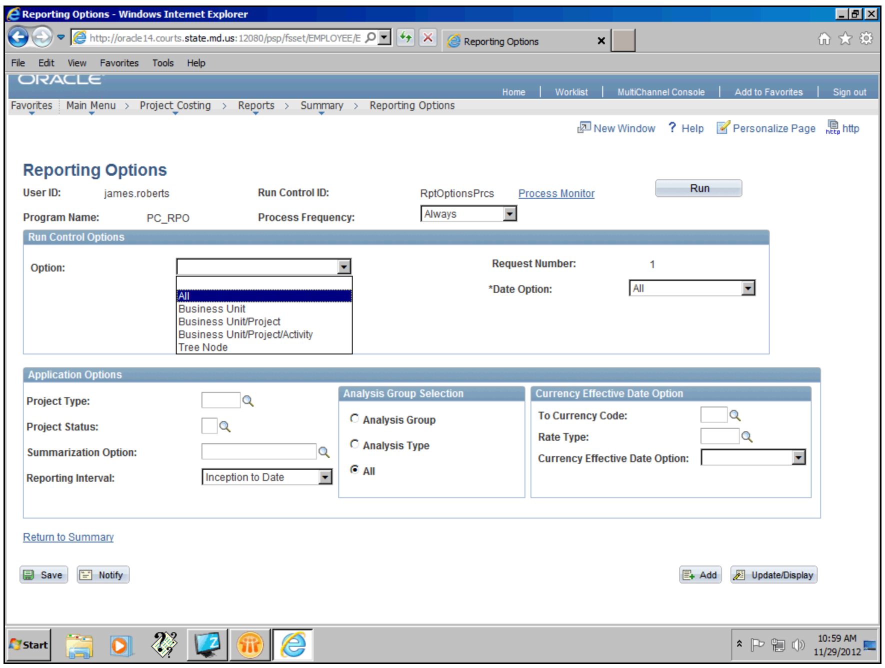
Step	Action
1.	Click the **Project Costing** link. ▷ Project Costing
2.	Click the **Reports** link. Reports
3.	Click the **Summary** link. Summary
4.	Click the **Reporting Options** link. Reporting Options



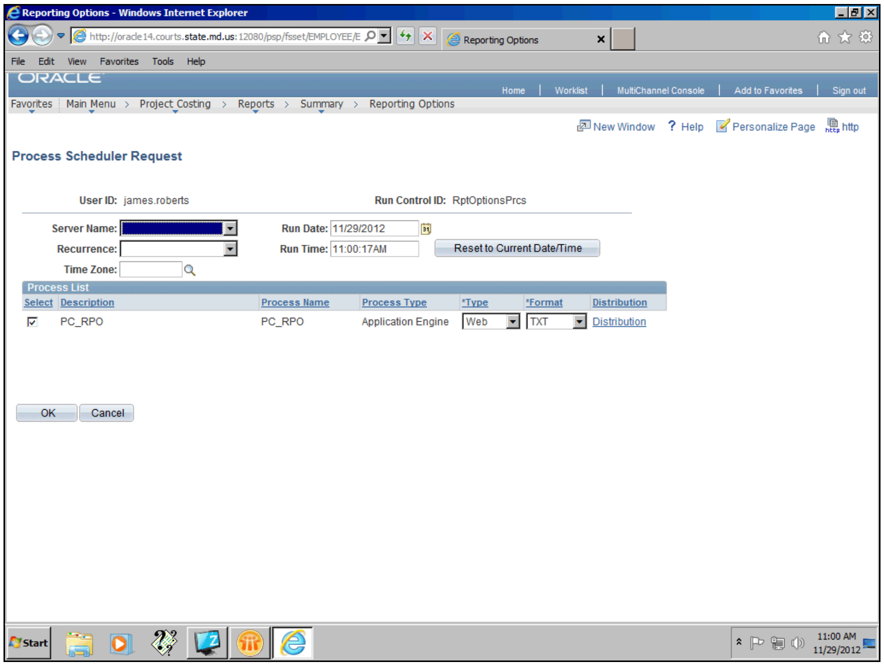
Step	Action
5.	Click the **Add a New Value** tab. 



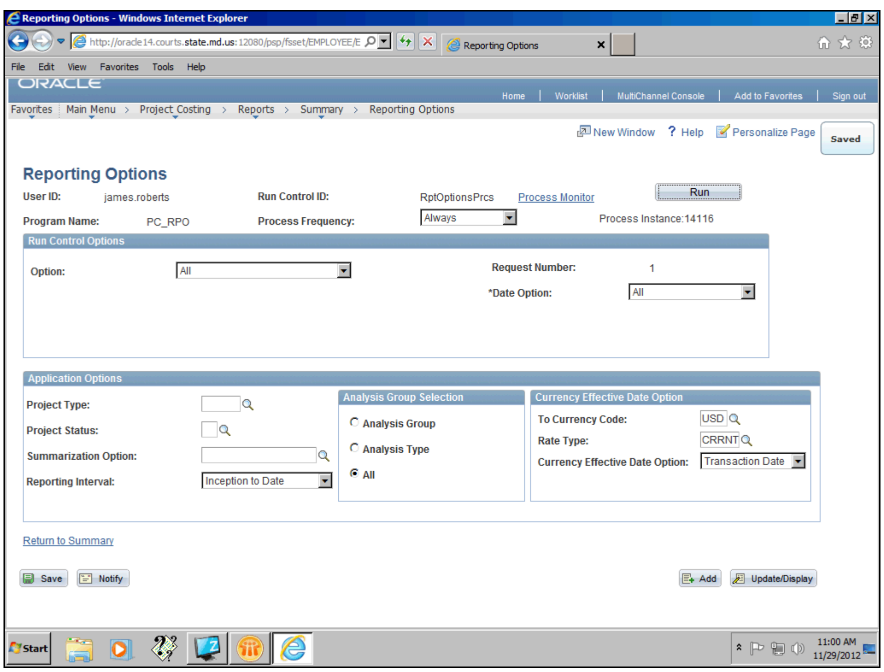
Step	Action
6.	Enter the desired information into the **Run Control ID** field. Enter "**RptOptionsPrcs**".
7.	Click the **Add** button. Add



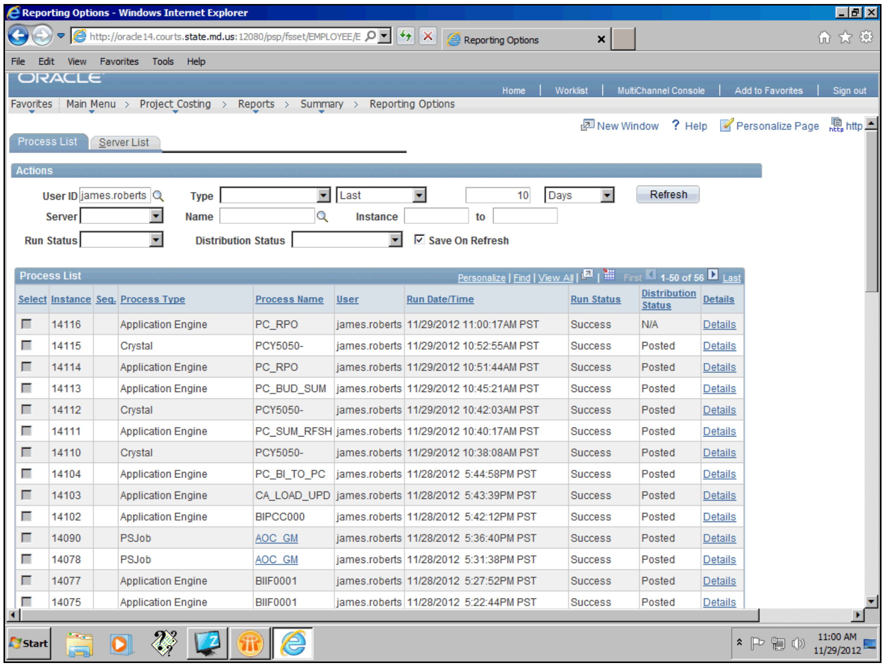
Step	Action
8.	In the **Option** list, click the **All** list item. All
9.	Enter the desired information into the **To Currency Code** field. Enter "**USD**".
10.	Enter the desired information into the **Rate Type** field. Enter "**CRRNT**".
11.	Click the **Currency Effective Date Option** list.
12.	Click the **Transaction Date** list item. Transaction Date
13.	Click the **Save** button. Save
14.	Click the **Run** button. Run



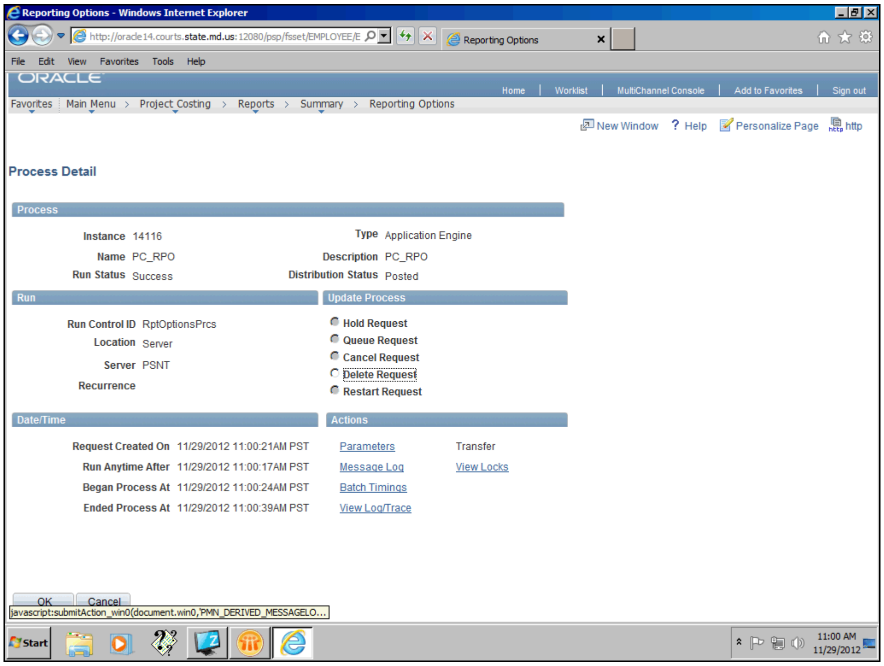
Step	Action
15.	Click the **OK** button. OK



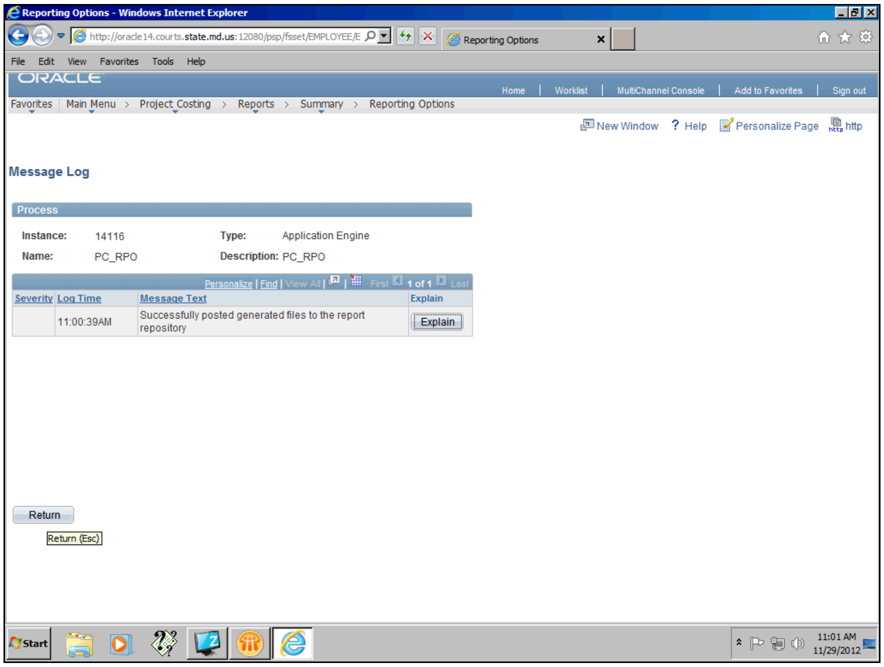
Step	Action
16.	Click the **Process Monitor** link. Process Monitor



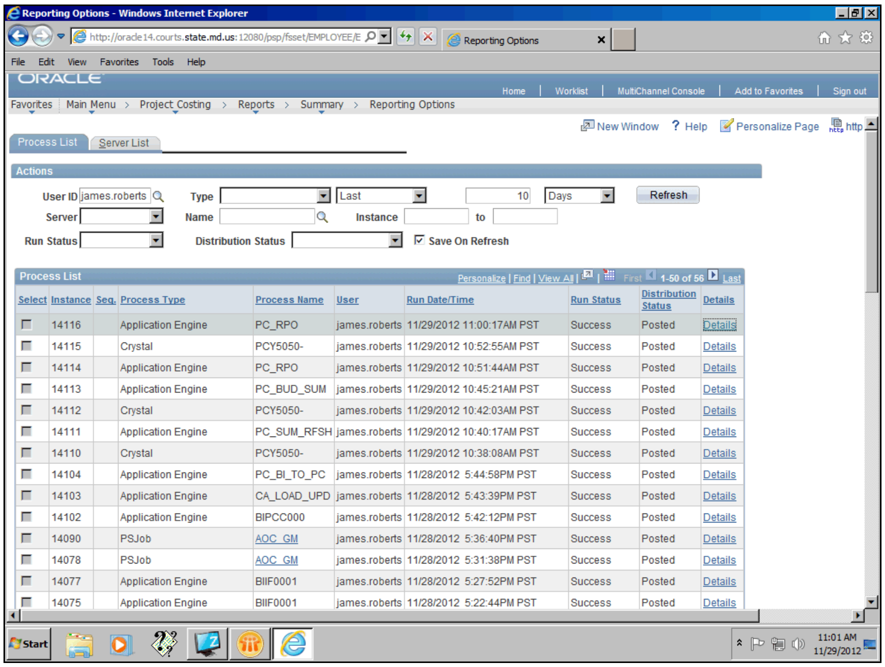
Step	Action
17.	Click the **Refresh** button. Refresh
18.	Click the **Details** link. Details



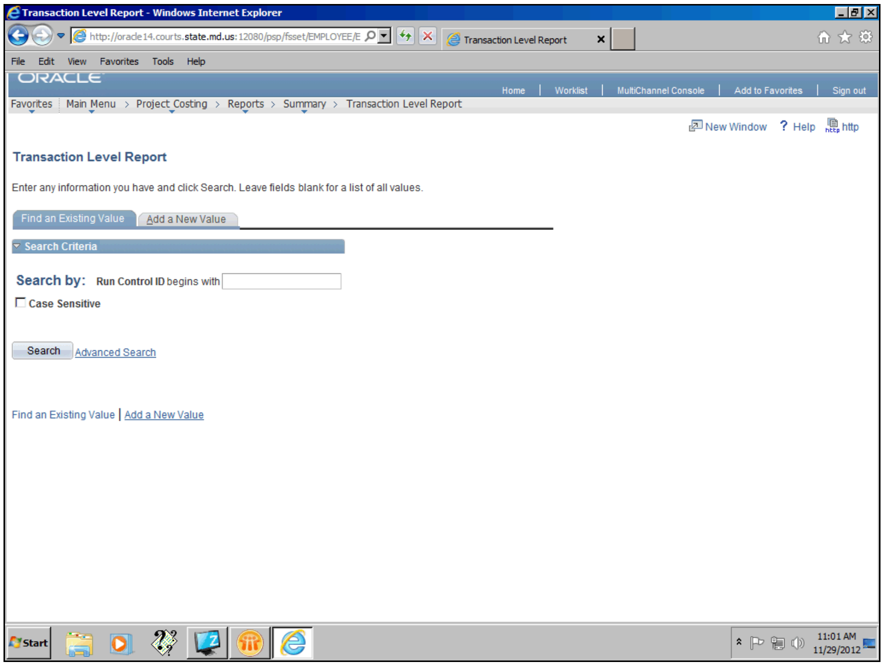
Step	Action
19.	Click the **Message Log** link. Message Log



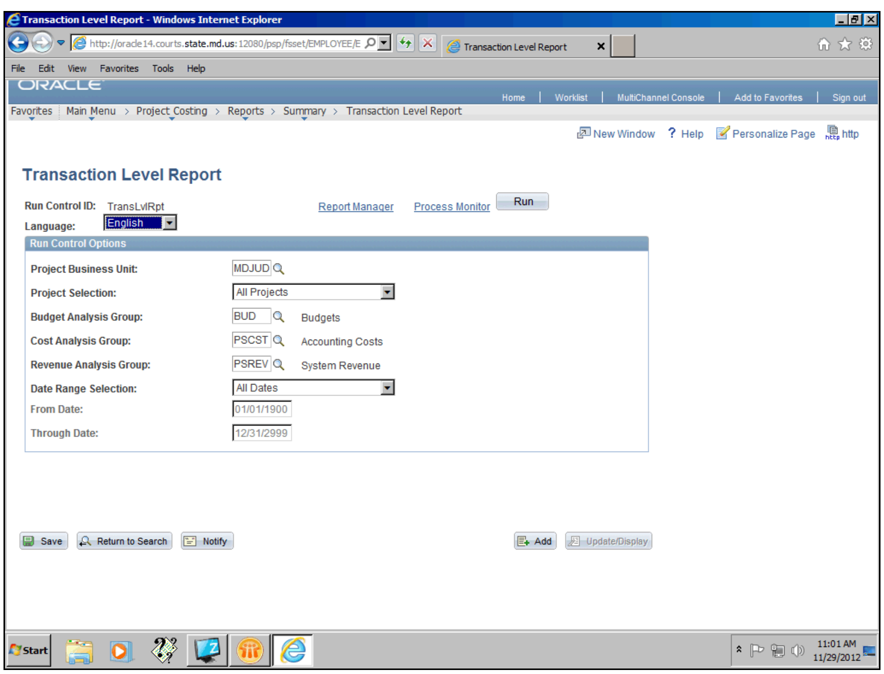
Step	Action
20.	Click the **Return** button. Return
21.	Click the **OK** button. OK



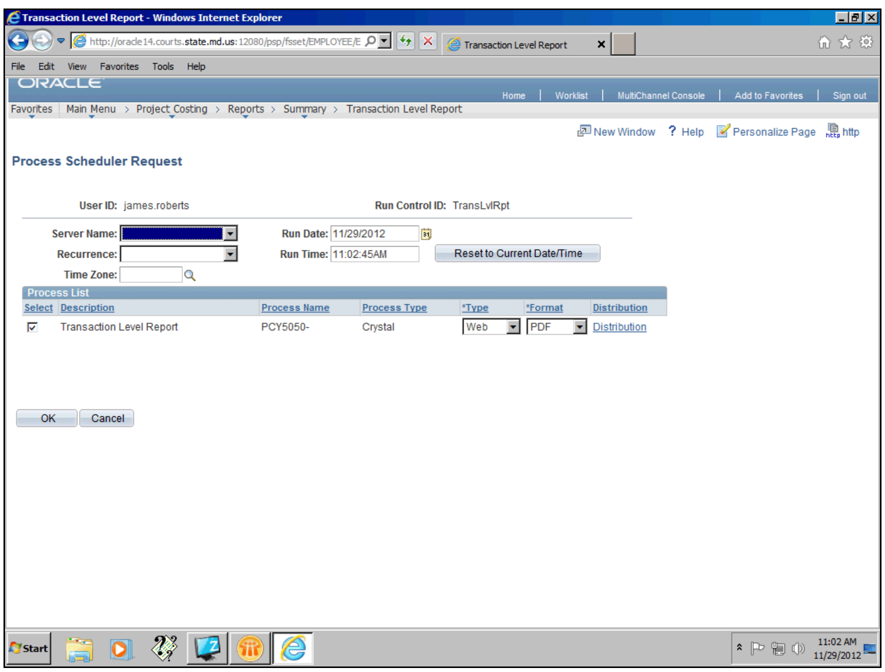
Step	Action
22.	Click the **Summary** button. Summary
23.	Click the **Transaction Level Report** menu. Transaction Level Report



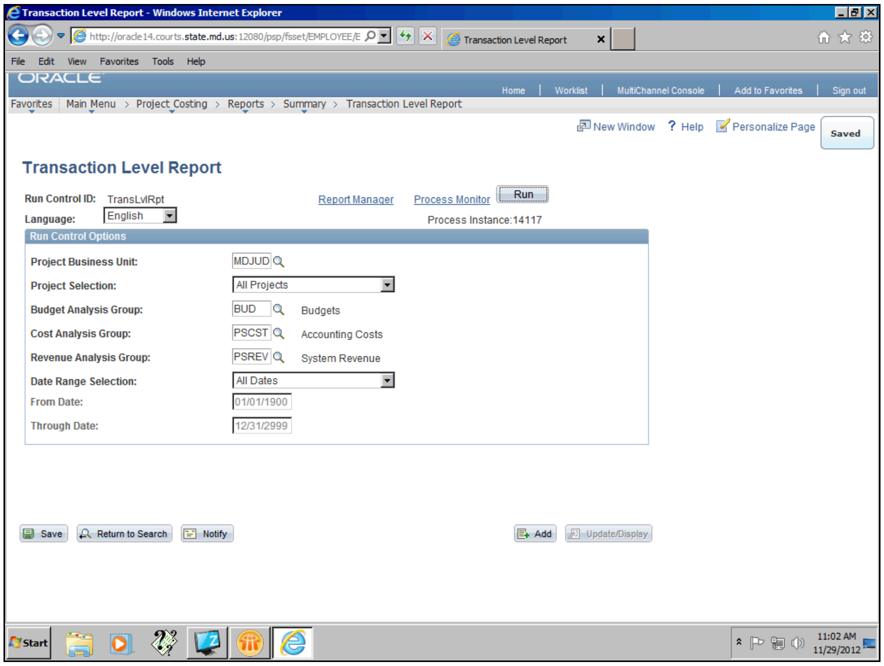
Step	Action
24.	Enter the desired information into the **Run Control ID** field. Enter "**TransLvlRpt**".
25.	Click the **Search** button. Search



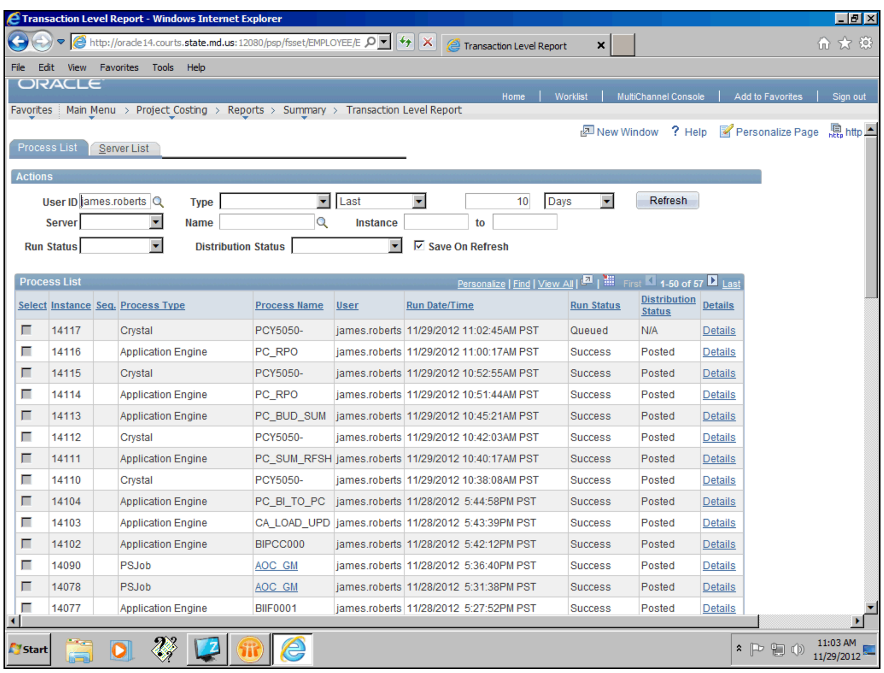
Step	Action
26.	Enter the desired information into the **Budget Analysis Group** field. Enter "**BUD**". This group contains the BUD analysis type.
27.	Enter the desired information into the **Cost Analysis Group** field. Enter "**PSCST**". This group contains the ACT, CAC, CAJ, CCA, CCO, CCR, COM, CQR, CRQ, CRV, GLE, REQ, RRV analysis types.
28.	Enter the desired information into the **Revenue Analysis Group** field. Enter "**PSREV**". This group contains the BAJ, BIL, BLD, OLT, UAJ, UTL, WTO analysis types.
29.	Click the **Date Range Selection** list and select **All Dates**. All Dates
30.	Click the **Run** button. Run



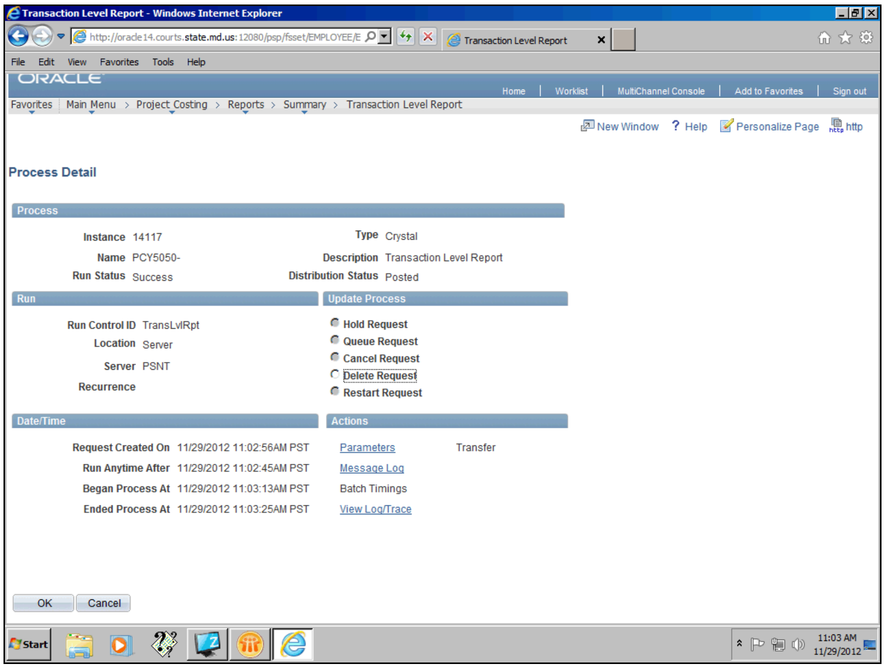
Step	Action
31.	In the **Server Name** list, click the **PSNT** list item.
32.	Click the **OK** button. OK



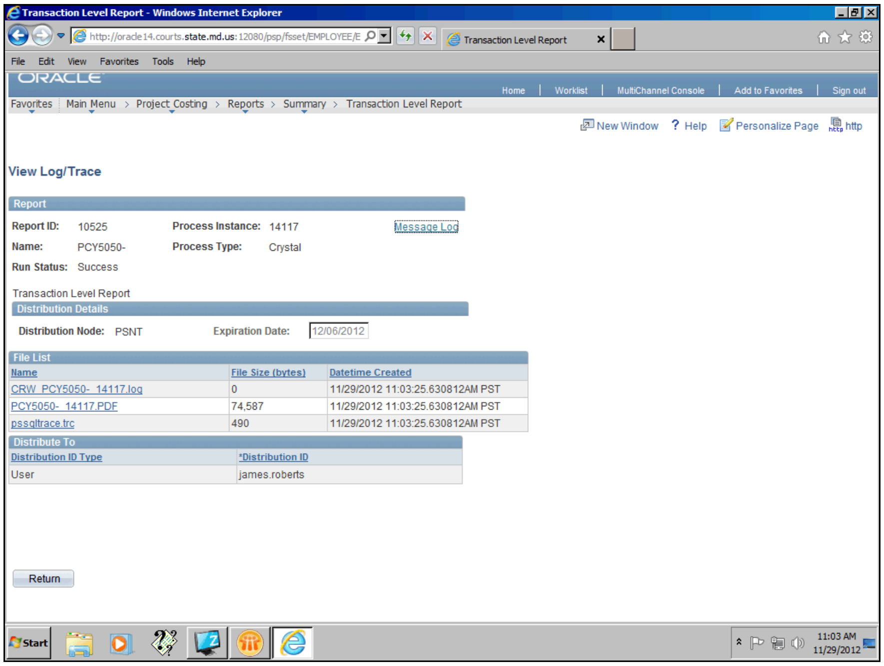
Step	Action
33.	Click the **Process Monitor** link. Process Monitor



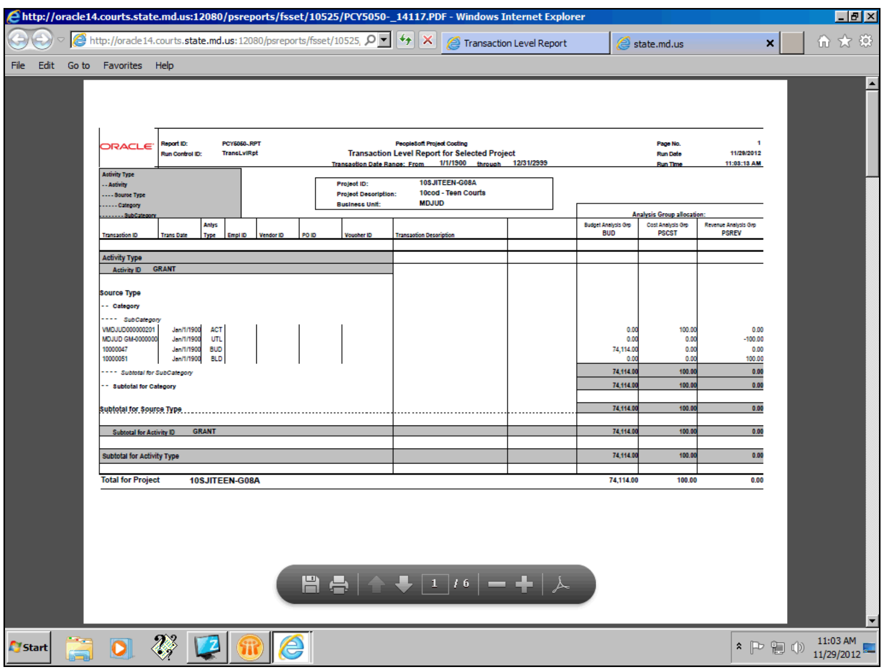
Step	Action
34.	Click the **Refresh** button. Refresh
35.	Click the **Details** link. Details



Step	Action
36.	Click the **View Log/Trace** link. View Log/Trace



Step	Action
37.	Click the **PCY5050-_14117.PDF** link. PCY5050-_14117.PDF



Step	Action
38.	Review the Transaction Report. Print the report using the Internet browser options, if desired.
39.	**End of Procedure.**

3.2 Updating the Billing and Revenue Plan Statuses

Any billing and revenue recognition plans associated with a customer contract or the award lines that are active and in progress must be completed or cancelled prior to closing a contract. You can access the billing and revenue plans associated with customer contract lines on **Customer Contract - Lines** page.

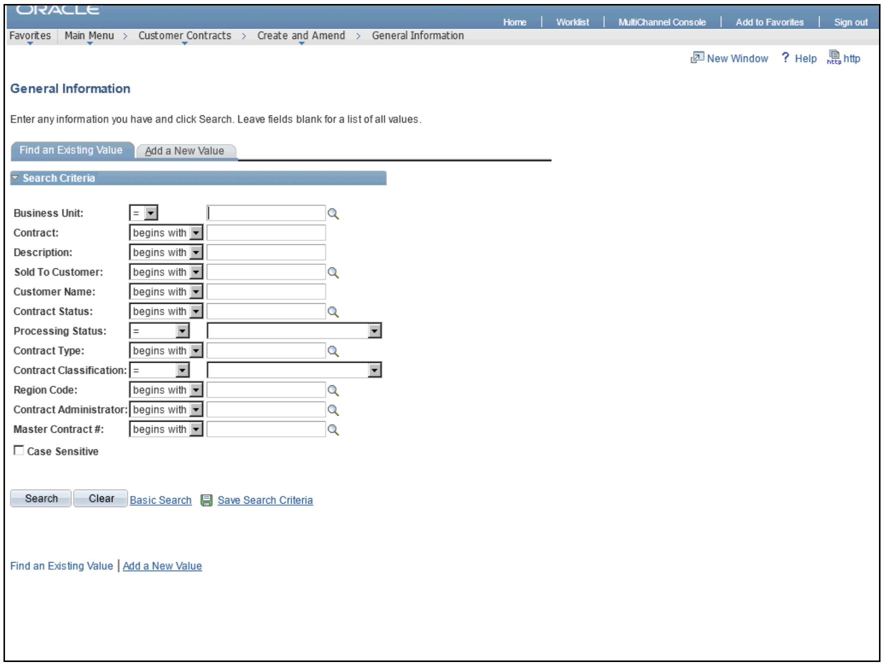
After completing this topic, you will be able to:

- Cancel the billing plan(s) associated with a customer contract
- Cancel the revenue plan(s) associated with a customer contract

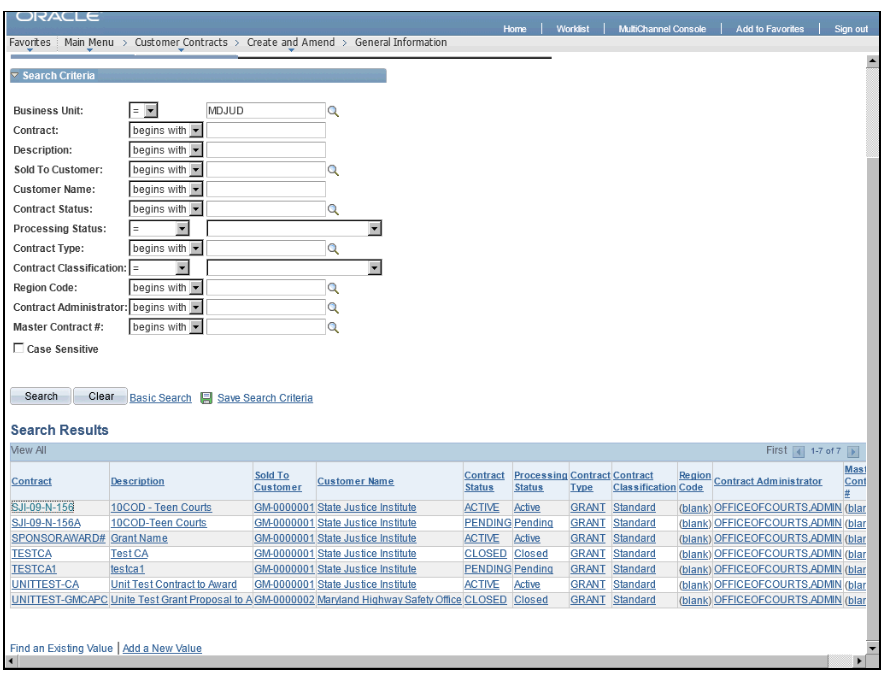
Procedure

In this topic, you will update the Billing and Revenue Plan statuses.

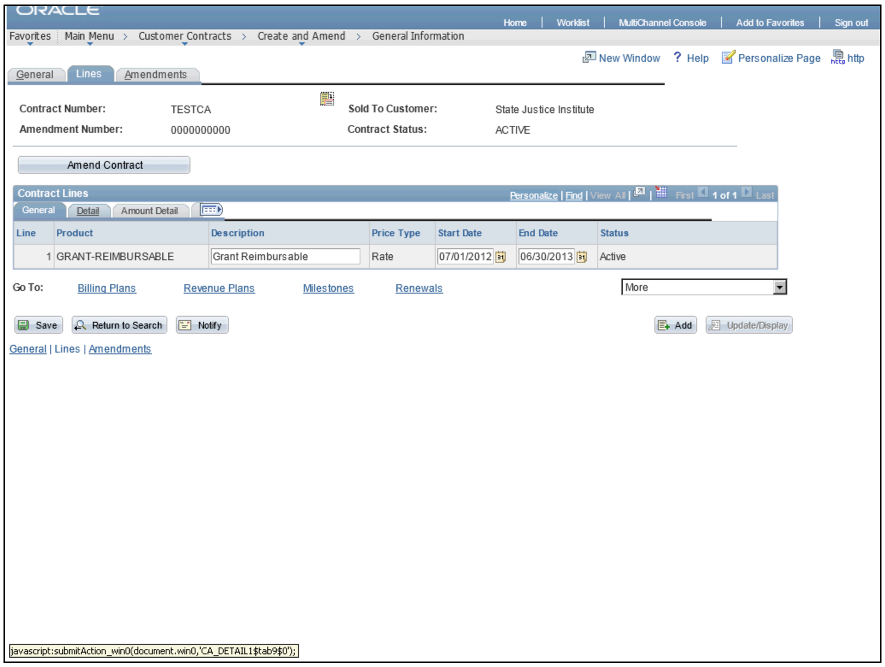
Step	Action
1.	Begin by navigating to the **Look Up General Information** page. Click the **Customer Contracts** link. Customer Contracts
2.	Click the **Create and Amend** link. Create and Amend
3.	Click the **General Information** link. General Information



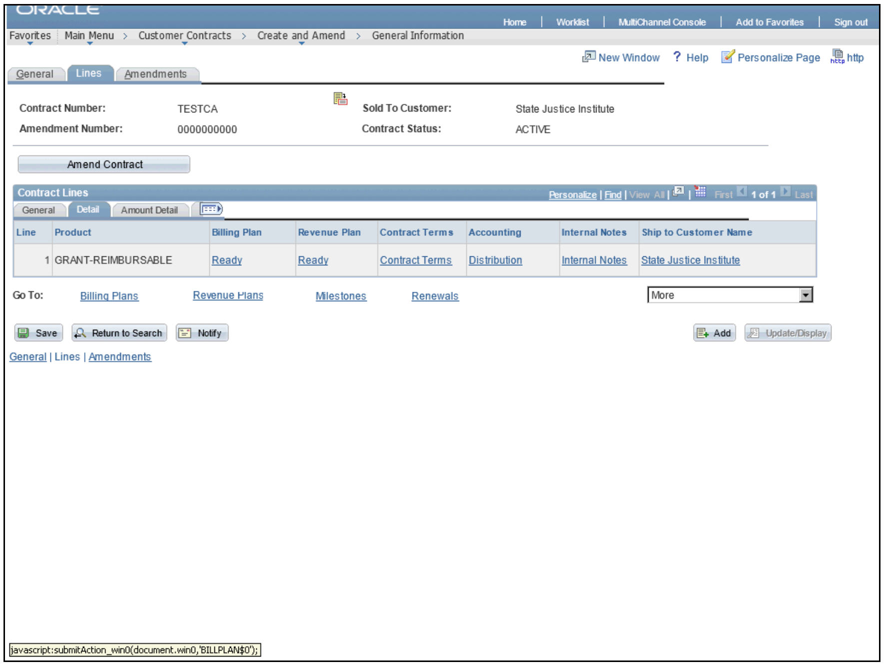
Step	Action
4.	Enter the desired information into the **Business Unit** field. Enter "**MDJUD**".
5.	Click the **Search** button. Search
6.	Move the scrollbar downward.



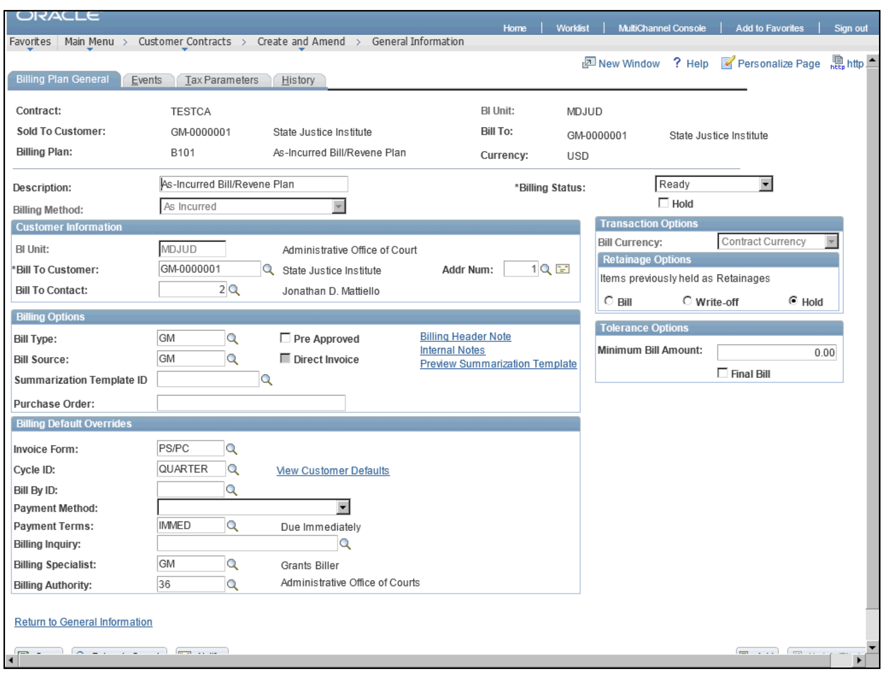
Step	Action
7.	Click the **UNITTEST-CA** link. UNITTEST-CA



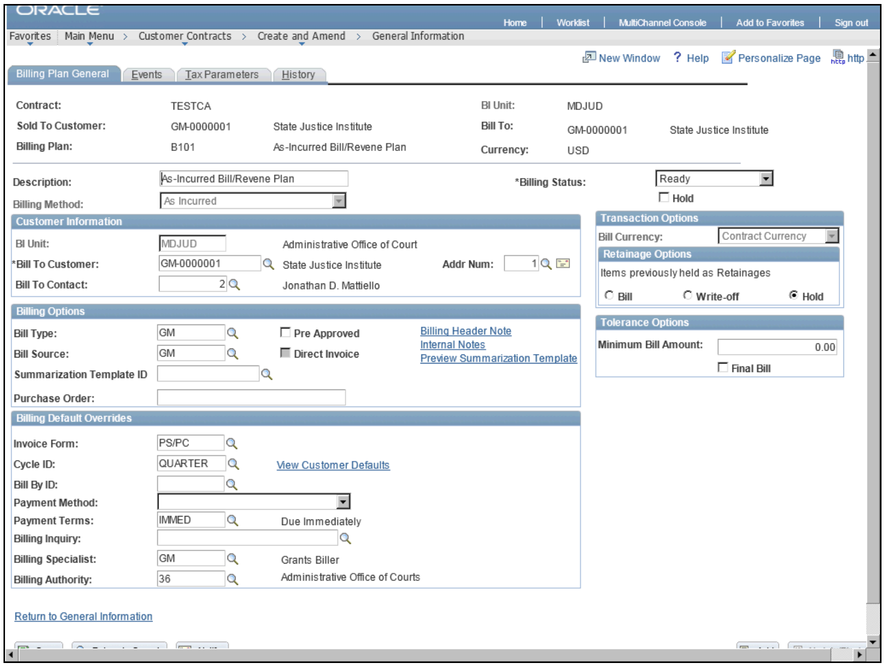
Step	Action
8.	Click the **Detail** tab. Detail

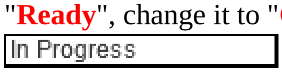
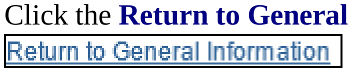


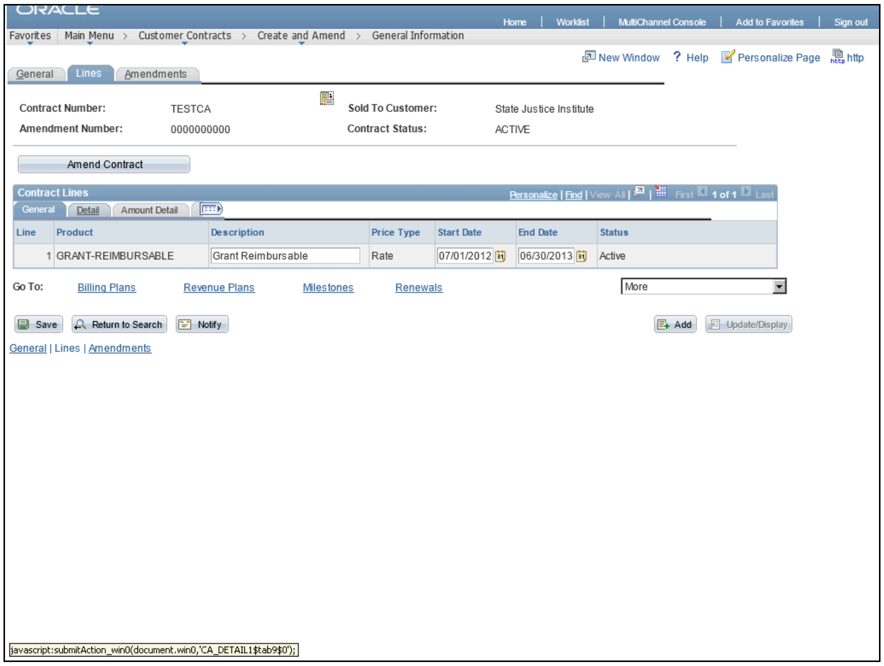
Step	Action
9.	Click the **Ready** link. 



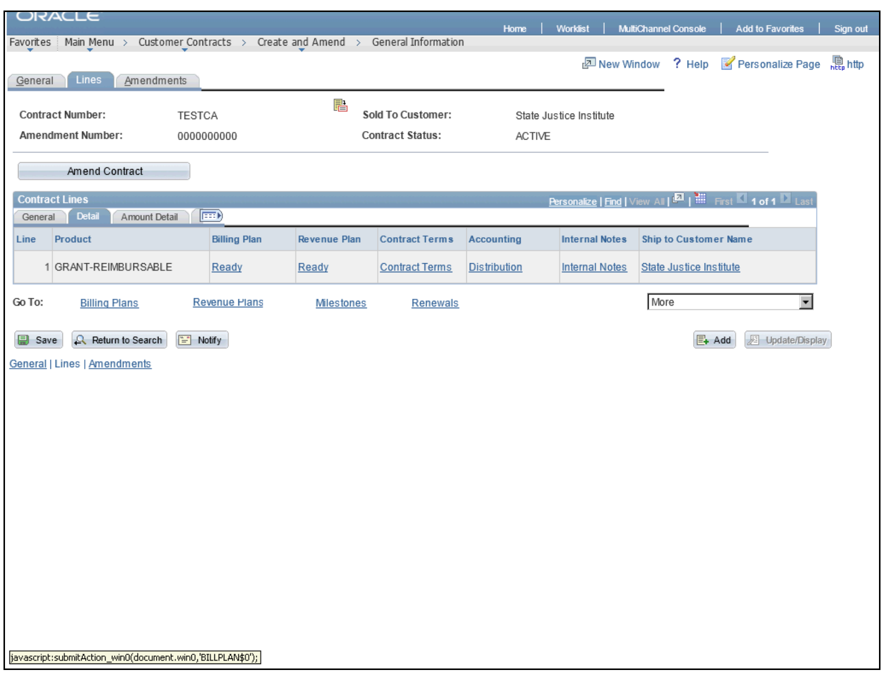
Step	Action
10.	The **Billing Plan** page displays.



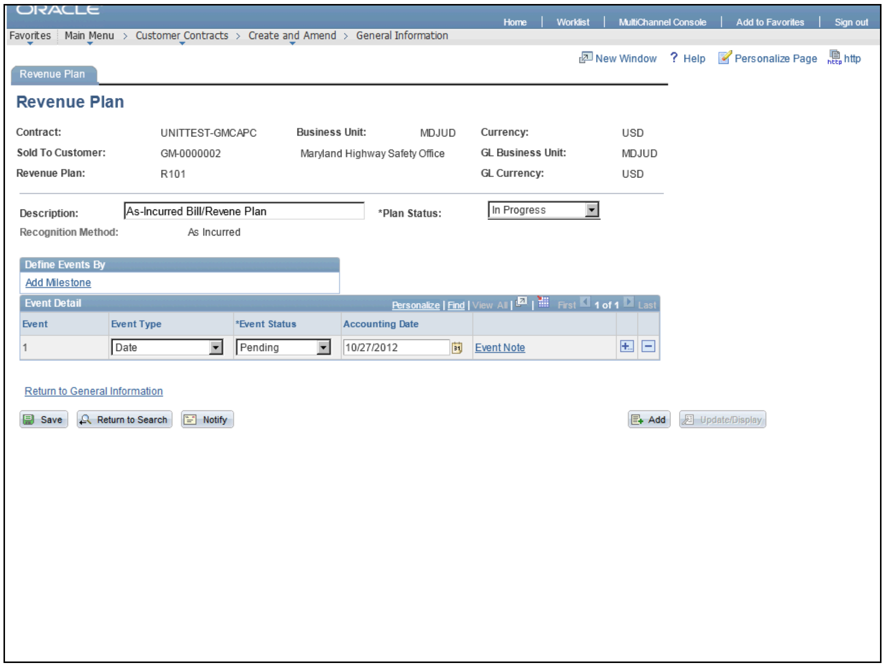
Step	Action
11.	Click the **Billing Status** list. 
12.	Change the **Billing Status** from its current value. For example, if currently "**Ready**", change it to "**Cancelled**". 
13.	Click the **Save** button. 
14.	Click the **Return to General Information** link. 



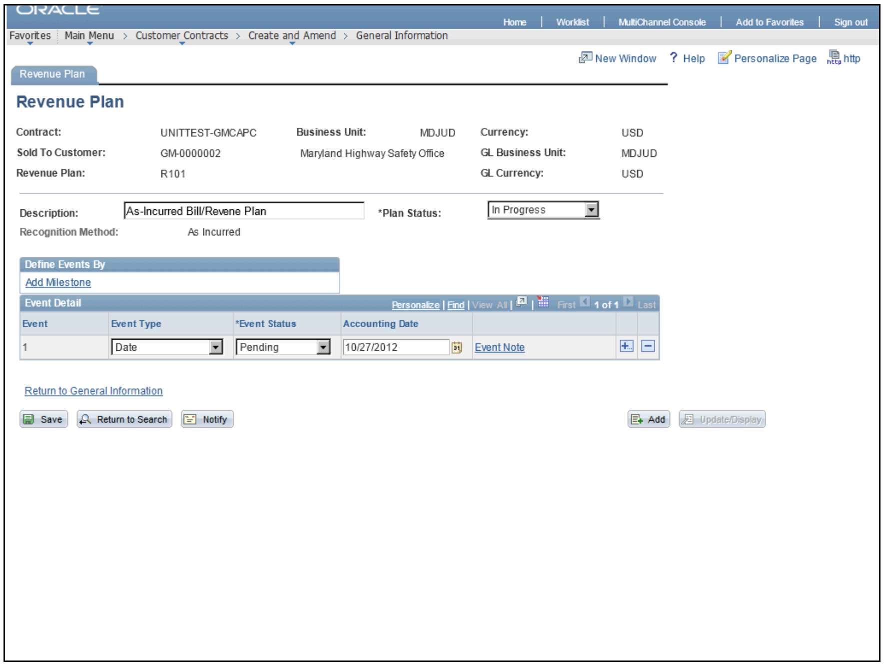
Step	Action
15.	Click the **Detail** tab. 



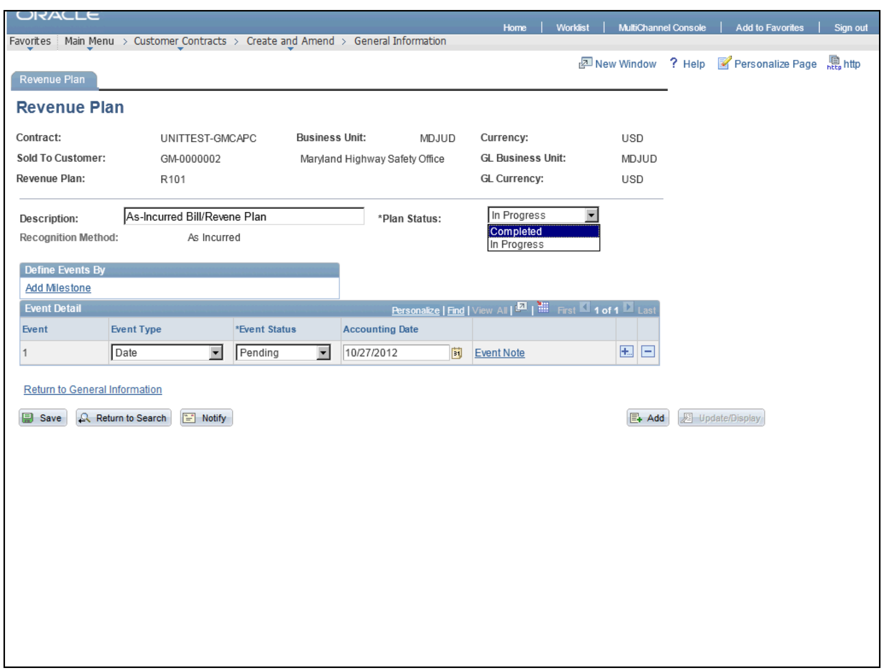
Step	Action
16.	Click the **Ready** link under the Revenue Plan. Ready



Step	Action
17.	The **Revenue Plan** page displays. Use the **Revenue Plan** page to change the revenue plan Plan Status to "Completed". Changing the **Plan Status** to "Completed**"** prevents any revenue recognition transactions from being processed and enables you to set the overall contract or award status to "Closed".



Step	Action
18.	Click the **Plan Status** list box. 



Step	Action
19.	Click the **Completed** list item. Completed
20.	Click the **Save** button. Save
21.	Click the **Return to General Information** link to return back to the **General** page. Return to General Information
22.	You have successfully completed the *Updating the Billing and Review Plans* topic. You have learned how to: - Cancel the billing and revenue plans associated with a customer contract **End of Procedure.**

3.3 Closing a Contract

When you change the status of the contract to "Closed", the system runs a series of edit checks to verify that there are no billing or revenue recognition plans associated with the contract that are "In Progress". An error message displays when this is the case.

After completing this topic, you will be able to:

- Close a grant related customer contract

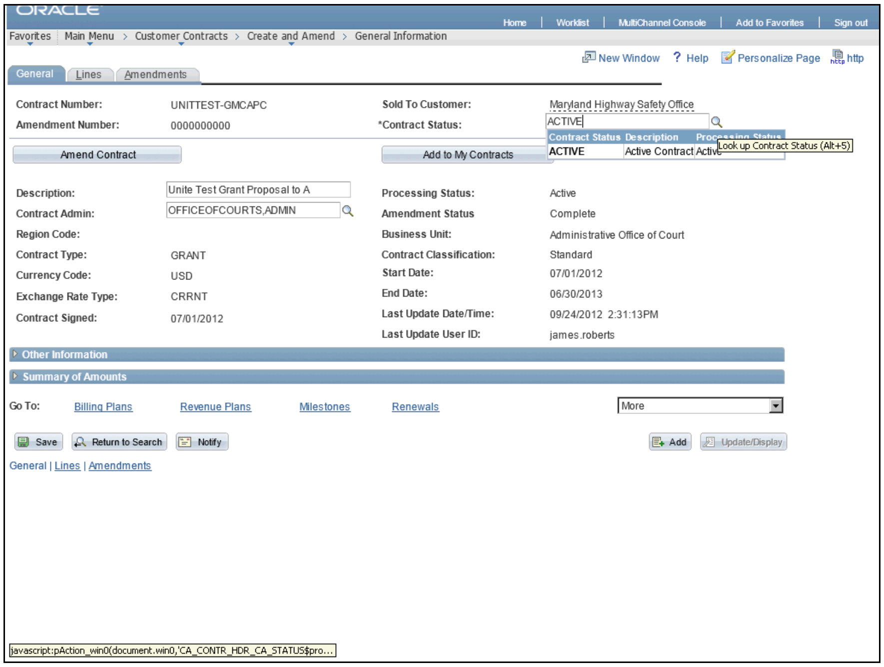
Procedure

Before closing a contract, verify that the Billing Status and Revenue Plan Status have been changed to "Complete".

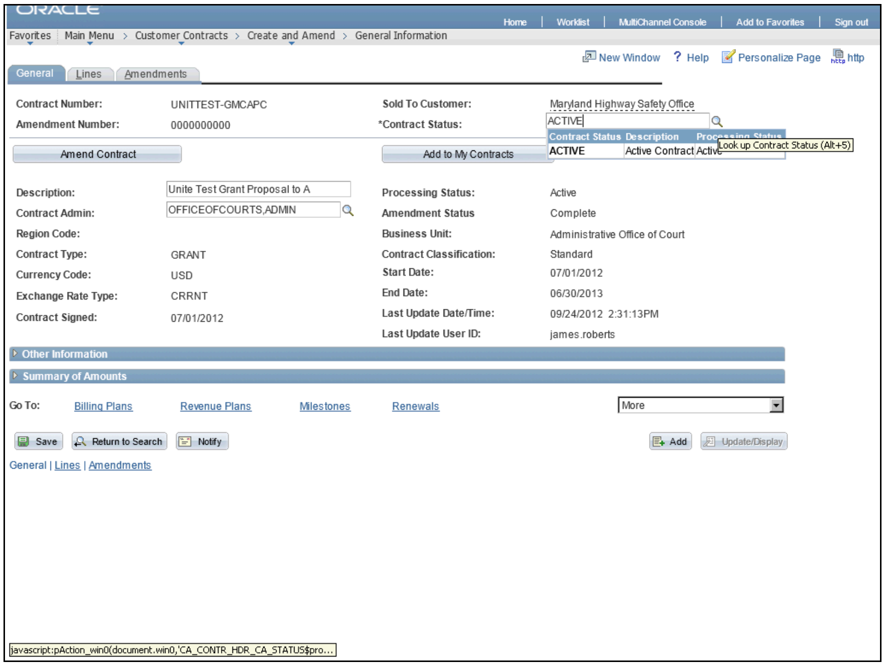
In this topic, you will close a contract.

Step	Action
1.	Click the **Save** button. Return to General Information
2.	After updating the billing and revenue plans for each contract line, access the General Information Click the **Customer Contracts** tab. Customer Contracts
3.	Click the **Create and Amend** menu. Create and Amend

Step	Action
4.	Click the **General Information** menu. 



Step	Action
5.	Use the **General** page to set up and manage contract header information.



Step	Action
6.	Next, close out the overall award or contract by changing the **Contract Status** at the contract header level to CLOSED. Contracts or awards that are set to CLOSED are removed from processing and views, but the historical award data is still available to query. Click the **Look up Contract Status** button. 
7.	Click the **CLOSED** link. 
8.	Click the **Save** button. 
9.	You have successfully completed *Closing a Contract topic.* You have learned how to: - Close a customer contract **End of Procedure.**

3.4 Closing a Grant Project

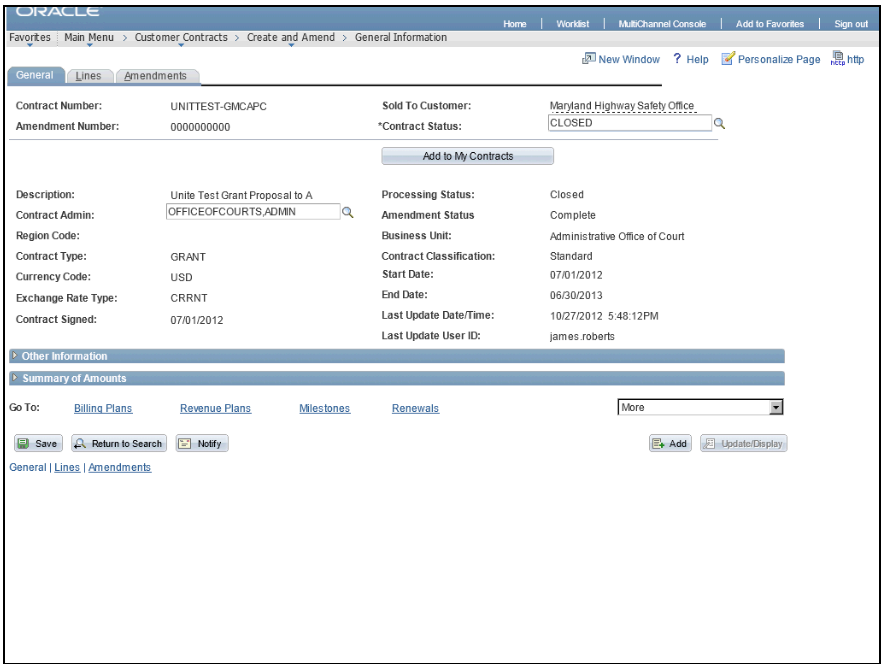
After you close a customer contract, the next step is to close any projects that are associated with the award. You can access the Project from the Contract General Information component. When the project(s) associated with a grant is closed, no more transactions can be processed against the grant project. This is done by changing the status of the project to "Closed".

After completing this topic you will be able to:

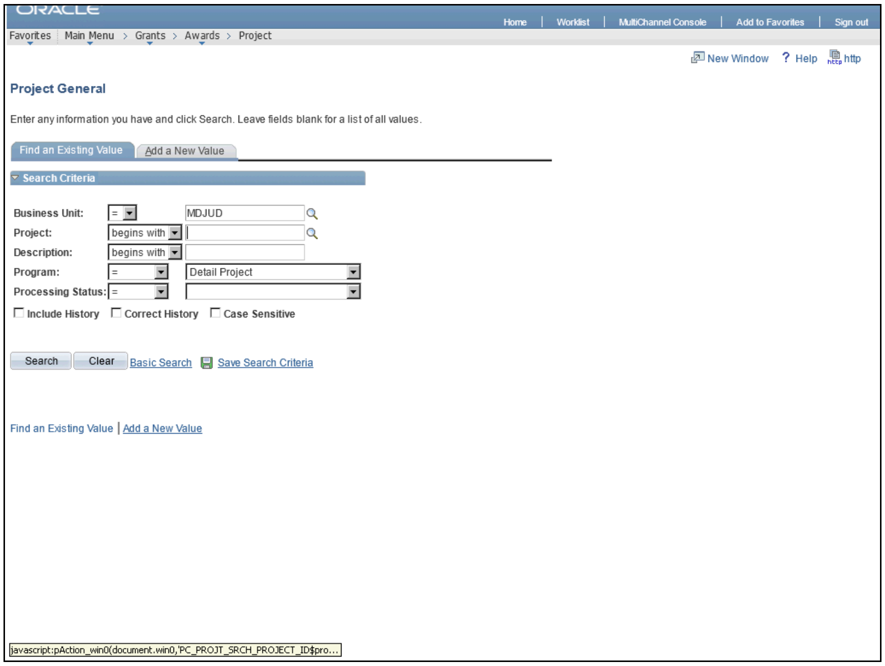
- Close a grant project

Procedure

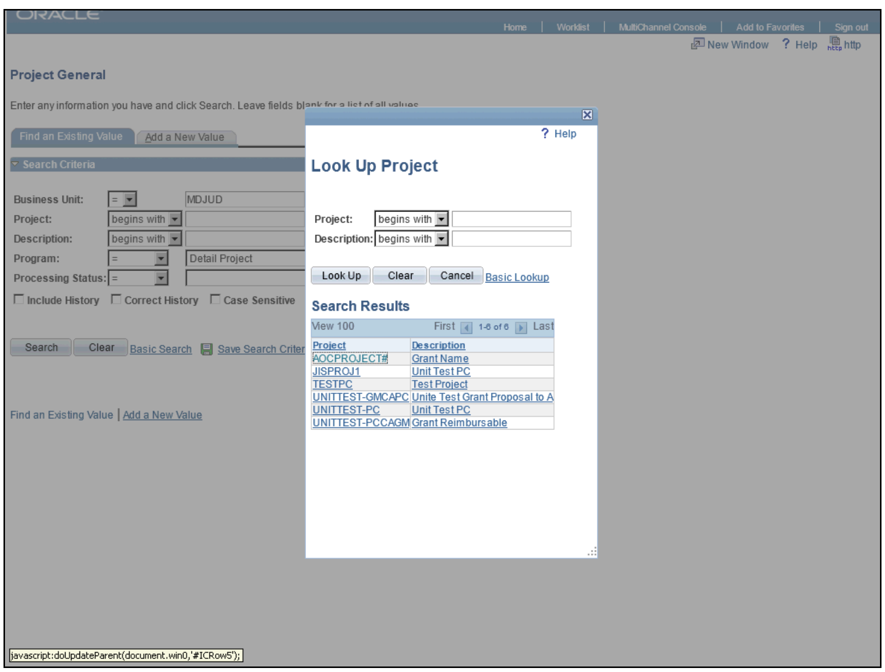
In this topic the Project associated with the Grant will be closed to reject any further transactions against it.



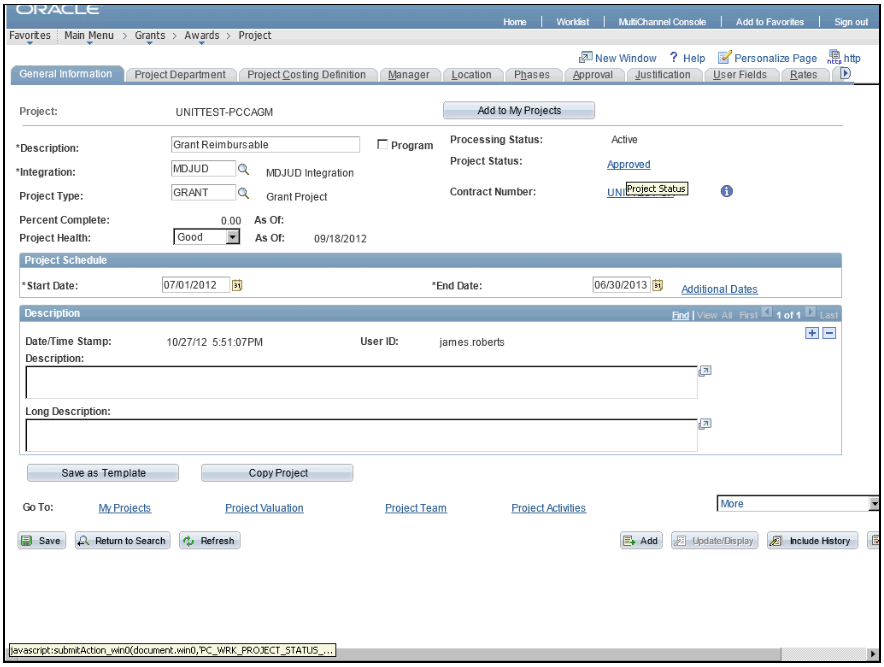
Step	Action
1.	After you close out the contract, the next step is to close any projects that are associated with the award by navigating to the **General Information** page. Click the **Main Menu** button. Main Menu
2.	Click the **Grants** menu. Grants
3.	Click the **Awards** menu. Awards
4.	Click the **Project** menu. Project



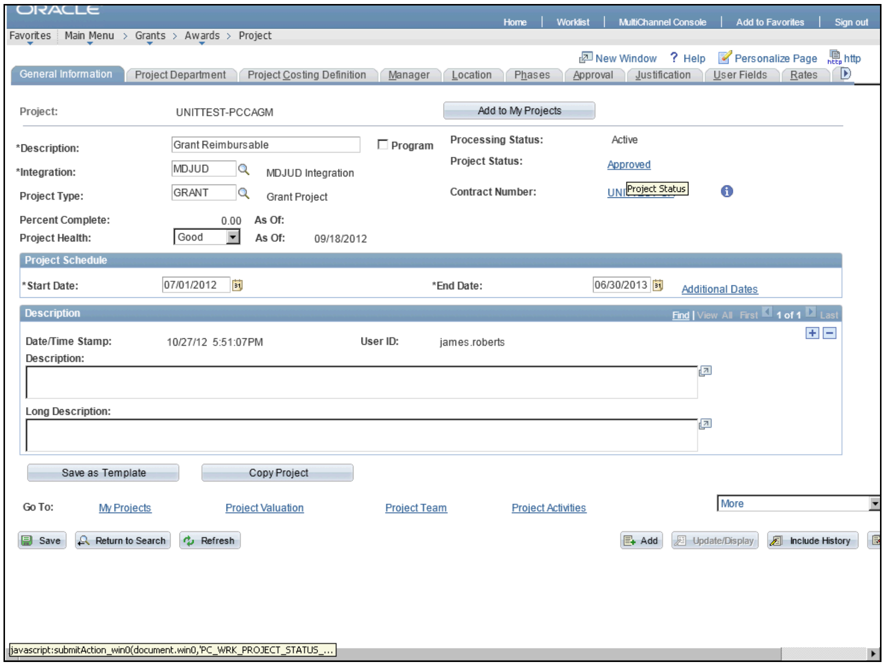
Step	Action
5.	Click the **Look up Project** button.



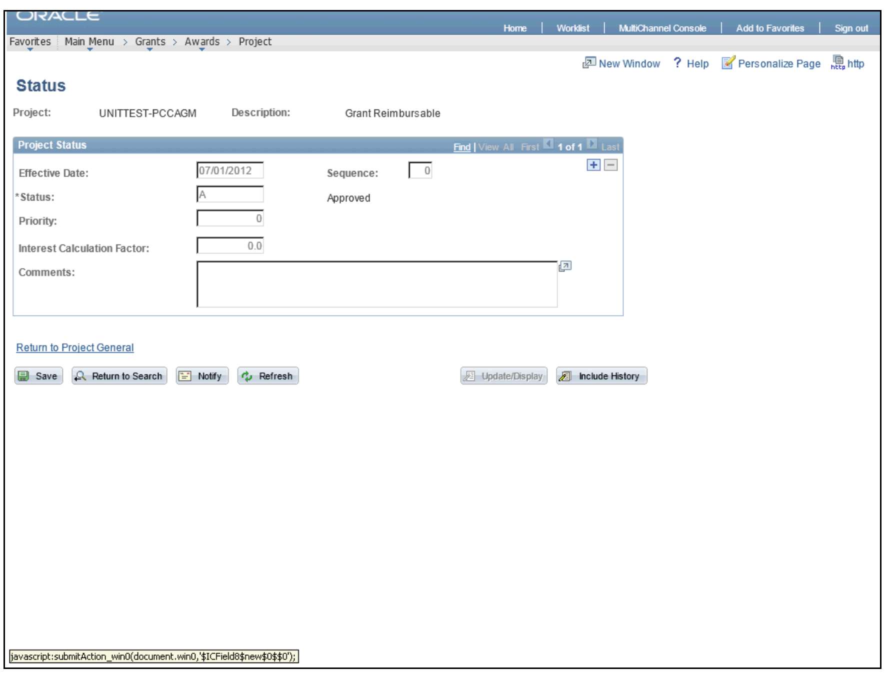
Step	Action
6.	Click the **UNITTEST-PCCAGM** menu. UNITTEST-PCCAGM
7.	Click the **Search** button. Search



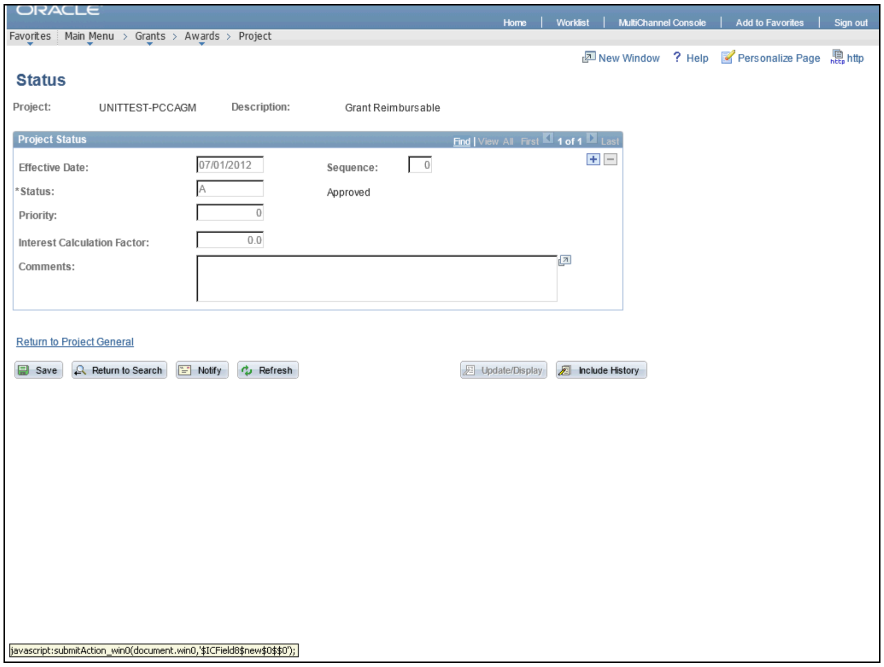
Step	Action
8.	The **General Information** page displays. Use the **General Information** page to close a project associated with an award.



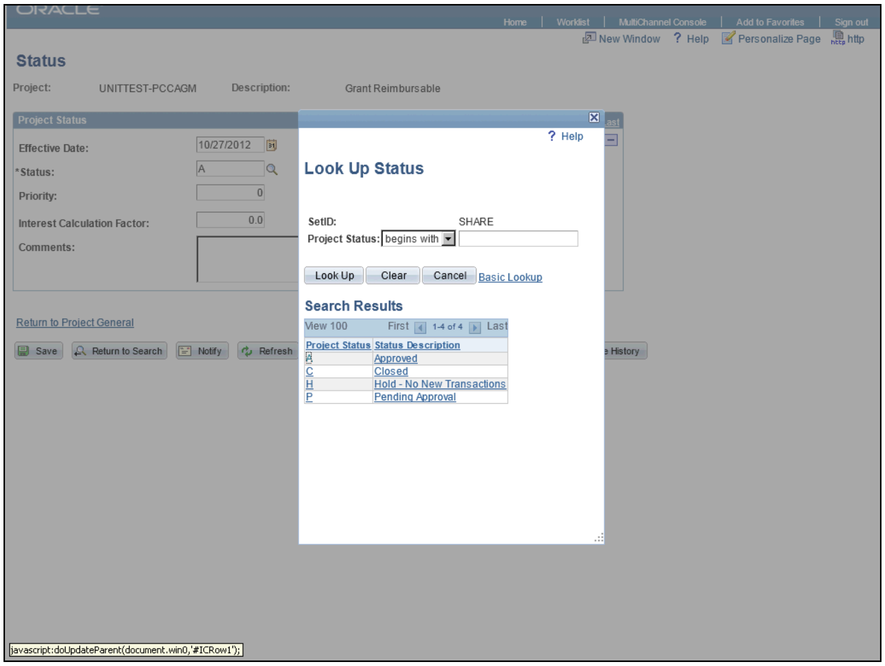
Step	Action
9.	Click the **Approved** link. Approved



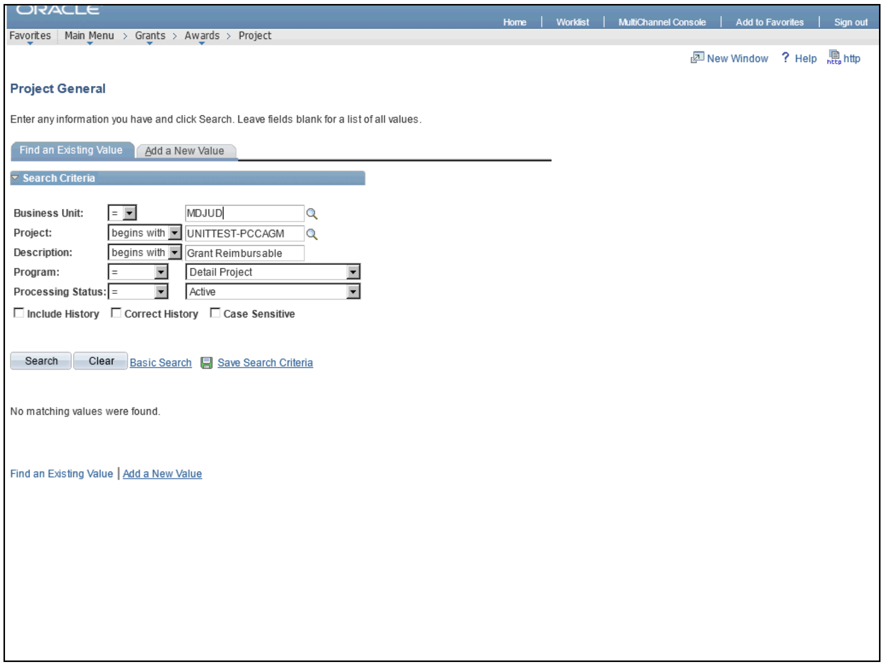
Step	Action
10.	Use the **Status** page to set the **Status** field to Closed. A closed project does not appear in prompt lists in GEARS feeder systems.



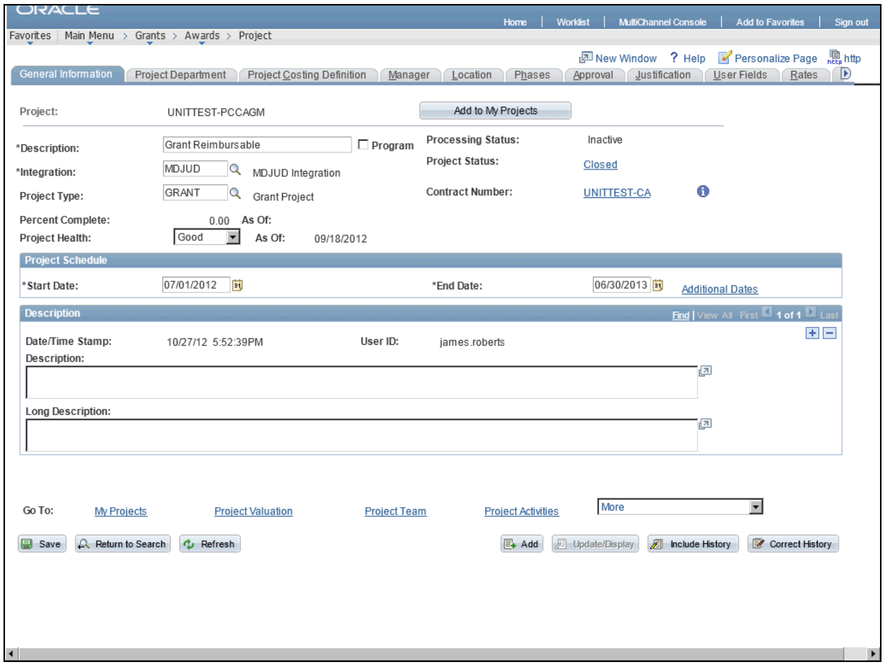
Step	Action
11.	Click the **Add a new row at row 1** button. 
12.	Click the **Look up Status** button. 



Step	Action
13.	Click the **Closed** link. Closed
14.	Click the **Save** button. Save
15.	Notice that the Project Status is now **Closed**. Click the **Return to Project General** link. Return to Project General



Step	Action
16.	Click the **Processing Status** list. 
17.	Click the **Inactive** list item. 
18.	Click the **Search** button. 



Step	Action
19.	Verify that the **Processing Status** field is set to *Inactive* and the **Project Status** field is set to *Closed*.
20.	You have successfully completed *Closing a Project.* You have learned how to: - Close a project **End of Procedure.**

Course Summary

Congratulations!

You have successfully completed the *GR220 Managing Grant Customer Contracts* course. In this course, you have learned how to:

- Update a customer contract (reimbursable grant)
- Review activity and information related to a grant including budget and revenue amounts, actual costs and contract details
- Close and reconcile grant contracts, projects and related billing and revenue plans

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at http://courtnet/gears/index.html (http://courtnet/gears/index.html).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gears@mdcourts.gov (mailto:gears@mdcourts.gov).